

**CASE STUDY DETAILS****OPQ PLAN****LEAVERS  
[NO SPECIAL  
CIRCUMSTANCES]****Event history**Date of first event      **02/09/2026**                      First event      **LEAVER**

Date of second event    Second event

**Member details**Surname                      **CARTER**                      Forenames      **ETHAN**Date of birth                      **12/03/1966**                      Gender              **MALE**Spouse's date of birth    **15/10/1977**

Child dependant's date of birth

Date of joining company    **01/05/2015**Date of joining plan    **01/05/2015**Target retirement date    **12/03/2031****Annual salary history for the plan year commencing 6 April**

<b>2018</b>	<b>2019</b>	<b>2020</b>	<b>2021</b>	<b>2022</b>	<b>2023</b>	<b>2024</b>	<b>2025</b>	<b>2026</b>
<b>29,000</b>	<b>31,000</b>	<b>32,000</b>	<b>34,000</b>	<b>36,500</b>	<b>40,000</b>	<b>42,400</b>	<b>45,000</b>	<b>48,650</b>

**Contribution history**Total member's normal contributions    **£ 27,104.64**Total employer's normal contributions    **£ 43,367.42**Total member's AVCs    **£**

## Personal Retirement Account details

### Member's Current Unit Holdings

<b>Fund</b>	<b>Member's normal contributions</b>	<b>Employer's normal contributions</b>	<b>Member's AVCs</b>
	<b>Unit Holdings</b>	<b>Unit Holdings</b>	<b>Unit Holdings</b>
Global Equity Fund			
Index Linked Bond Fund			
Balanced Fund			
Corporate Bond Fund			
Cash Fund			
Lifestyle Fund	17,800.0164	28,480.0262	

### Investment Fund Unit Prices

<b>Fund</b>	<b>Current Unit Price (£)</b>
Global Equity Fund	3.911
Index Linked Bond Fund	1.604
Balanced Fund	4.904
Corporate Bond Fund	2.738
Cash Fund	1.015

### **Special circumstances / additional information**

Ethan Carter's reason for leaving was resignation.