

CASE STUDY DETAILS**OPQ PLAN****LEAVERS
[NO SPECIAL
CIRCUMSTANCES]****Event history**

Date of first event **04/09/2026** First event **LEAVER**
Date of second event Second event

Member details

Surname **BENNETT** Forenames **LUCAS**
Date of birth **04/01/1968** Gender **MALE**
Spouse's date of birth **27/09/1969**
Child dependant's date of birth
Date of joining company **01/08/2012**
Date of joining plan **01/08/2012**
Target retirement date

Annual salary history for the plan year commencing 6 April

2018	2019	2020	2021	2022	2023	2024	2025	2026
25,000	27,000	29,200	34,000	37,000	39,000	39,000	44,000	46,500

Contribution history

Total member's normal contributions **£ 22,447.10**
Total employer's normal contributions **£ 35,915.36**
Total member's AVCs **£**

Personal Retirement Account details

Member's Current Unit Holdings

Fund	Member's normal contributions	Employer's normal contributions	Member's AVCs
	Unit Holdings	Unit Holdings	Unit Holdings
Global Equity Fund	10,102.4182	16,163.8691	
Index Linked Bond Fund	2,094.3188	3,350.9101	
Balanced Fund			
Corporate Bond Fund			
Cash Fund	1,169.0248	1,870.4397	
Lifestyle Fund			

Investment Fund Unit Prices

Fund	Current Unit Price (£)
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

Lucas Bennett's reason for leaving was resignation.