

CASE STUDY DETAILS**OPQ PLAN****TRANSFERS****Event history**

Date of first event	14/05/2016	First event	PRESERVED LEAVER
Date of second event	09/09/2026	Second event	TRANSFER OUT

Member details

Surname	O'BRIEN	Forenames	NIAMH
Date of birth	12/12/1962	Gender	FEMALE
Spouse's date of birth	18/07/1955		
Child dependant's date of birth			
Date of joining company	01/03/2005		
Date of joining plan	01/03/2005		
Target retirement date	12/12/2027		

Contribution history

Total member's normal contributions	£ 33,614.76
Total employer's normal contributions	£ 53,783.62
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			
Index Linked Bond Fund			
Balanced Fund			
Corporate Bond Fund			
Cash Fund			
Lifestyle Fund	28,803.5610	46,085.6976	

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

In accordance with the Occupational and Personal Pension Schemes (Conditions for Transfers) Regulations 2021, the Scheme Trustees have completed all necessary due diligence checks. They are satisfied that this is a legitimate transfer and that it can proceed.