

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

Date of first event	<b>13/04/2006</b>	First event	<b>PRESERVED LEAVER</b>
Date of second event	<b>14/09/2026</b>	Second event	<b>TRANSFER OUT</b>

**Member details**

Surname	<b>GRANT</b>	Forenames	<b>OLIVER</b>
Date of birth	<b>08/05/1980</b>	Gender	<b>MALE</b>
Spouse's date of birth	<b>11/02/1982</b>		
Child dependant's date of birth			
Date of joining company	<b>01/06/1998</b>		
Date of joining plan	<b>01/06/1998</b>		
Target retirement date	<b>08/05/2045</b>		

**Contribution history**

Total member's normal contributions	<b>£</b>	<b>8,278.19</b>
Total employer's normal contributions	<b>£</b>	<b>13,245.10</b>
Total member's AVCs	<b>£</b>	<b>6,200.00</b>

## 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			2,850.9124
Index Linked Bond Fund			
Balanced Fund			
Corporate Bond Fund			
Cash Fund			
Lifestyle Fund	5,029.8473	8,047.7557	

### 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**

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.