**cASE STUDY DETAILS OPQ PLAN DEATHS**

**Event history**

Date of first event **05/09/2019** First event **DEATH**

Date of second event Second event

**Member details**

Surname **HUGHES** Forenames **ROBYN**

Date of birth **18/06/1985** Gender **FEMALE**

Spouse's date of birth **27/03/1983**

Dependent child's date of birth

Date of joining company **28/02/2009**

Date of joining scheme **28/02/2009**

Target retirement date

**Annual salary history for the plan year commencing 6 April**

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **2011** | **2012** | **2013** | **2014** | **2015** | **2016** | **2017** | **2018** | **2019** |
|  |  |  |  |  |  |  |  |  |
| **32,800** | **34,400** | **35,640** | **36,714** | **38,292** | **41,356** | **41,769** | **41,978** | **42,398** |
|  |  |  |  |  |  |  |  |  |

**Contribution history**

Total member's normal contributions **£** **48,275.00**

Total employer’s normal contributions **£ 77,240.00**

Total member's AVCs **£**

**Personal Retirement Account details**

**Member’s Current Unit Holdings**

|  |  |  |  |
| --- | --- | --- | --- |
| **Fund** | **Member’s normal contributions****Unit Holdings** | **Employer’s normal contributions****Unit Holdings** | **Member’s****AVCs****Unit Holdings** |
| Global Equity Fund |  48,351.1480 |  68,122.1420 |   |
| Index Linked Bond Fund |  16,127.2841 |  21,450.1473 |  |
| Balanced Fund |  25,813.1465 | 32,415.8123 |  |
| Corporate Bond Fund |  |  |  |
| Cash Fund |  |  |  |
| Lifestyle Fund |  |  |  |

**Investment Fund Unit Prices**

|  |  |
| --- | --- |
| **Fund** | **Current Unit Price (£)** |
| Global Equity Fund | 3.847  |
| Index Linked Bond Fund | 1.498 |
| Balanced Fund | 4.383 |
| Corporate Bond Fund | 2.637 |
| Cash Fund | 1.017 |

**Special circumstances / additional information**

Robyn Hughes’ current available Lifetime Allowance is 100.00%.