**cASE STUDY DETAILS OPQ PLAN DEATHS**

**Event history**

Date of first event **07/09/2019** First event **DEATH**

Date of second event Second event

**Member details**

Surname **KHAN**  Forenames **PETRA**

Date of birth **20/10/1965** Gender **FEMALE**

Spouse's date of birth **12/09/1966**

Dependent child's date of birth

Date of joining company **17/02//2002**

Date of joining scheme **17/02//2002**

Target retirement date

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

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **2011** | **2012** | **2013** | **2014** | **2015** | **2016** | **2017** | **2018** | **2019** |
|  |  |  |  |  |  |  |  |  |
| **20,978** | **21,547** | **30,119** | **31,240** | **32,451** | **33,102** | **33,957** | **34,845** | **35,352** |
|  |  |  |  |  |  |  |  |  |

**Contribution history**

Total member's normal contributions **£** **27,541.50**

Total employer’s normal contributions £ **44,066.40**

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 | 3,975.1712 | 4,145.1926 |  |
| Index Linked Bond Fund |  |  |  |
| Balanced Fund |  |  |  |
| Corporate Bond Fund | 19,841.5147 | 22,841.2143 |  |
| Cash Fund | 28,147.5142 | 32,410.1314 |  |
| 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**

In July 2015, Petra Khan completed a major project for the company. In recognition of this, the trustees awarded an additional £10,000.00 to be added to Petra Khan’s Personal Retirement Account in the event of her retirement or earlier death. This augmentation amount is not included in the units shown above.

Petra Khan’s current available Lifetime Allowance is 100.00%.