**cASE STUDY DETAILS OPQ PLAN DEATHS**

**Event history**

Date of first event **03/04/2018** First event **PRESERVED**

Date of second event **18/08/2020** Second event **DEATH**

**Member details**

Surname **SPIGOTT** Forenames **LUCY**

Date of birth **14/01/1976** Gender **FEMALE**

Spouse's date of birth **21/08/1971**

Dependent child's date of birth

Date of joining company **07/11/2008**

Date of joining scheme **07/11/2008**

Target retirement date

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

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **2012** | **2013** | **2014** | **2015** | **2016** | **2017** | **2018** | **2019** | **2020** |
|  |  |  |  |  |  |  |  |  |
| **28,130** | **28,958** | **29,844** | **30,738** | **31,658** | **32,612** | **33.588** | **34,582** | **35,636** |
|  |  |  |  |  |  |  |  |  |

**Contribution history**

Total member's normal contributions **£** **9,216.00**

Total employer’s normal contributions **£ 14,745.60**

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 | 1,286.0529 | 2,057.6846 |  |
| Index Linked Bond Fund |  |  |  |
| Balanced Fund | 4,212.3621 |  |  |
| Corporate Bond Fund |  |  |  |
| Cash Fund |  | 6,739.7882 |  |
| Lifestyle Fund |  |  |  |

**Investment Fund Unit Prices**

|  |  |
| --- | --- |
| **Fund** | **Current Unit Price (£)** |
| Global Equity Fund | 3.723 |
| Index Linked Bond Fund | 1.486 |
| Balanced Fund | 4.217 |
| Corporate Bond Fund | 2.734 |
| Cash Fund | 1.014 |

**Special circumstances / additional information**

Lucy Spigott’s current available Lifetime Allowance is 100.00%.