|  |  |  |  |
| --- | --- | --- | --- |
| **Event history**  Date of first event | **03/09/2020** | First event | **RETIREMENT** |
| Date of second event |  | Second event |  |
| **Member details**  Surname | **WILSON** | Forenames | **JANE** |
| Date of birth | **07/07/1964** | Gender | **FEMALE** |

|  |  |
| --- | --- |
| Spouse's date of birth |  |
| Dependent child's date of birth |  |
| Date of joining company | **26/05/2001** |
| Date of joining scheme | **26/05/2001** |
| Target retirement date |  |

# Annual salary history for the plan year commencing 6 April

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **2012** | **2013** | **2014** | **2015** | **2016** | **2017** | **2018** | **2019** | **2020** |
| **30,000** | **32,350** | **35,100** | **37,440** | **39,300** | **42,000** | **44,200** | **45,950** | **48,900** |

**Contribution history**

Total member's normal contributions **£ 44,236.80**

Total employer’s normal contributions **£ 70,778.88**

Total member's AVCs **£**

**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 |  |  |  |
| Index Linked Bond Fund | 9,400.2236 | 15,040.3578 |  |
| Balanced Fund |  |  |  |
| Corporate Bond Fund | 13,567.3240 | 21,707.7184 |  |
| Cash Fund |  |  |  |
| 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**

On 1 September 2020, Jane Wilson was granted an augmentation of £4,000.00, which is to be added to her Personal Retirement Account at the date of first event.

Jane Wilson has requested quotations assuming (a) she takes 15% of the overall value of her Personal Retirement Account (including the Augmentation) as a tax-free lump sum, with the balance being used to purchase a single life pension and (b) she takes no tax-free lump sum and uses the whole of her Personal Retirement Account to purchase a single life pension. The quotations for the single life pensions should be based on the “Annuity Bureau” factors and should be for the following options:

1. Non-increasing
2. Increasing annually at the lower of RPI/3.0%

Jane Wilson has additionally requested a quotation assuming she takes the entire proceeds of her Personal Retirement Account as a single Uncrystallised Funds Pension Lump Sum.

Jane Wilson’s current available Lifetime Allowance is 100.00%.