|  |  |  |  |
| --- | --- | --- | --- |
| **Event history**  Date of first event | **05/09/2020** | First event | **RETIREMENT** |
| Date of second event |  | Second event |  |
| **Member details**  Surname | **BRISTOW** | Forenames | **PETULA** |
| Date of birth | **17/08/1952** | Gender | **FEMALE** |

|  |  |
| --- | --- |
| Spouse's date of birth | **12/07/1955** |
| Dependent child's date of birth |  |
| Date of joining company | **16/04/2003** |
| Date of joining scheme | **16/04/2003** |
| Target retirement date | **17/08/2022** |

# Annual salary history for the plan year commencing 6 April

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **2012** | **2013** | **2014** | **2015** | **2016** | **2017** | **2018** | **2019** | **2020** |
| **27,200** | **29,400** | **31,445** | **33,600** | **37,300** | **40,050** | **43,200** | **45,000** | **46,100** |

**Contribution history**

Total member's normal contributions **£ 20,250.34**

Total employer’s normal contributions **£ 32,400.54**

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 |  |  |  |
| Balanced Fund |  |  |  |
| Corporate Bond Fund |  |  |  |
| Cash Fund |  |  |  |
| Lifestyle Fund | 11,325.2348 | 18,120.3757 |  |

**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 11 January 2005, Petula Bristow transferred in to the OPQ Plan her benefits from the registered DC arrangement of her former employer. The transfer in of £15,456.86 consisted entirely of employer contributions and purchased 4,278.6286 units in the Balanced Fund. These units are additional to the Unit Holdings detailed above.

Petula Bristow has requested quotations assuming she uses her entire Personal Retirement Account to purchase a pension using the “Annuity Bureau” factors. Petula Bristow would like quotations for the following options:

1. Non-increasing (single life)
2. Non-increasing (joint life)

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

Petula Bristow’s current available Lifetime Allowance is 66.46%.