**cASE STUDY DETAILS OPQ PLAN LEAVERS –PRESERVED**

**NO SPECIAL CIRCUMSTANCES**

**Event history**

Date of first event **03/09/2019** First event **LEAVER**

Date of second event Second event

**Member details**

Surname **KIRK** Forenames **JOSHUA**

Date of birth **04/05/1958** Gender **MALE**

Spouse's date of birth **07/06/1971**

Dependent child's date of birth

Date of joining company **30/11/2015**

Date of joining scheme **30/11/2015**

Target retirement date  **04/05/2023**

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

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **2011** | **2012** | **2013** | **2014** | **2015** | **2016** | **2017** | **2018** | **2019** |
|  |  |  |  |  |  |  |  |  |
|  |  |  |  | **15,302** | **17,964** | **19,392** | **21,471** | **23,983** |
|  |  |  |  |  |  |  |  |  |

**Contribution history**

Total member's normal contributions **£ 2,483.25**

Total employer’s normal contributions **£ 3,852.18**

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 | 0.0000 | 0.0000 | 0.0000 |
| Index Linked Bond Fund | 0.0000 | 0.0000 | 0.0000 |
| Balanced Fund | 0.0000 | 0.0000 | 0.0000 |
| Corporate Bond Fund | 0.0000 | 0.0000 | 0.0000 |
| Cash Fund | 0.0000 | 0.0000 | 0.0000 |
| Lifestyle Fund | 193.3165 | 304.1503 | 0.0000 |

**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**

Mr Kirk’s reason for leaving was Voluntary.

**LEAVERS [NO SPECIAL**

**CIRCUMSTANCES]**

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