**cASE STUDY DETAILS OPQ PLAN DEATHS**

**Event history**

Date of first event **05/09/2019** First event **DEATH**

Date of second event Second event

**Member details**

Surname **RODRIGUEZ** Forenames **GABRIELA**

Date of birth **20/02/1971** Gender **FEMALE**

Spouse's date of birth **12/07/1970**

Dependent child's date of birth

Date of joining company **15/08/2012**

Date of joining scheme **15/08/2012**

Target retirement date

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

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **2011** | **2012** | **2013** | **2014** | **2015** | **2016** | **2017** | **2018** | **2019** |
|  |  |  |  |  |  |  |  |  |
| **28,145** | **28,989** | **29,569** | **30,456** | **30,761** | **32,048** | **32,988** | **34,601** | **34,735** |
|  |  |  |  |  |  |  |  |  |

**Contribution history**

Total member's normal contributions **£** **35,714.00**

Total employer’s normal contributions **£ 57,142.00**

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 | 28,741.0214 | 44,123.2720 |  |
| Index Linked Bond Fund | 15,138.2371 |  |  |
| Balanced Fund | 25,419.1035 | 8,472.8300 |  |
| Corporate Bond Fund |  |  |  |
| Cash Fund |  | 36,145.8130 |  |
| 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**

Gabriela Rodriguez’s current available Lifetime Allowance is 100.00%.