**cASE STUDY DETAILS OPQ PLAN DEATHS**

**Event history**

Date of first event **02/09/2020** First event **DEATH**

Date of second event Second event

**Member details**

Surname **PATEL** Forenames **TONY**

Date of birth **11/03/1963** Gender **MALE**

Spouse's date of birth **20/07/1961**

Dependent child's date of birth

Date of joining company **23/05/1998**

Date of joining scheme **23/05/1998**

Target retirement date **18/05/2022**

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

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **2011** | **2012** | **2013** | **2014** | **2015** | **2016** | **2017** | **2018** | **2019** |
|  |  |  |  |  |  |  |  |  |
| **18,712** | **19,584** | **20,180** | **21,812** | **22,416** | **22,960** | **23,178** | **24,888** | **25,412** |
|  |  |  |  |  |  |  |  |  |

**Contribution history**

Total member's normal contributions **£** **46,262.00**

Total employer’s normal contributions **£ 74,019.20**

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 |  |  |  |
| Index Linked Bond Fund |  |  |  |
| Balanced Fund |  |  |  |
| Corporate Bond Fund |  |  |  |
| Cash Fund |  |  |  |
| Lifestyle Fund | 27,410.6273 | 43,857.0037 |  |

**Investment Fund Unit Prices**

|  |  |
| --- | --- |
| **Fund** | **Current Unit Price (£)** |
| Global Equity Fund | 4.184 |
| Index Linked Bond Fund | 1.648 |
| Balanced Fund | 4.383 |
| Corporate Bond Fund | 2.637 |
| Cash Fund | 1.088 |

**Special circumstances / additional information**

Tony Patel’s current available Lifetime Allowance is 62.10%.