**cASE STUDY DETAILS XYZ SCHEME LEAVERS [WITH**

**SPECIAL CIRCUMSTANCES]**

# 

**Event history**

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

Date of second event Second event

**Member details**

Surname **WELLS** Forenames **OLIVIA**

Date of birth **21/01/1962** Gender **FEMALE**

Spouse’s date of birth **28/09/1961**

Dependent child’s date of birth **17/05/2006**

Date of joining company **01/07/1993**

Date of joining scheme **01/08/1993**

Category of membership **A**

**Pensionable salary history for the scheme year commencing 6 April**

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **2011** | **2012** | **2013** | **2014** | **2015** | **2016** | **2017** | **2018** | **2019** |
|  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |
| **22,430** | **23,450** | **24,900** | **26,100** | **27,550** | **29,350** | **33,000** | **34,600** | **33,200** |

**Contribution history**

Total member’s normal contributions **£ 22,554.43**

Total member’s AVCs **£**

Current value of AVCs **£**

**Contracting-out details at date of first event**

Pre 06/04/1988

GMP (per annum) **£**

Post 05/04/1988

GMP (per annum) **£ 582.40**

Contribution equivalent premium **£**

Certified amount **£**

**Special circumstances / additional information**

Ms Wells’ reason for leaving was voluntary.

On 15th November 1995, Ms Wells transferred in benefits from a previous employer.

The Scheme Actuary calculated that the amount transferred in bought a fixed pension of £1,523 p.a. payable from age 65 which had a 50% spouse’s pension attached.

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