**cASE STUDY DETAILS XYZ SCHEME DEATHS**

**Event history**

Date of first event **08/11/2017** First event **RETIREMENT**

Date of second event **04/09/2019** Second event **DEATH**

**Member details**

Surname **PURMA** Forenames **RINA**

Date of birth **08/11/1952** Gender **FEMALE**

Spouse’s date of birth

Dependent child’s date of birth

Date of joining company **06/11/1997**

Date of joining scheme **06/11/1997**

Category of membership **B**

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

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **2011** | **2012** | **2013** | **2014** | **2015** | **2016** | **2017** | **2018** | **2019** |
|  |  |  |  |  |  |  |  |  |
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|  |  |  |  |  |  |  |  |  |

**Contribution history**

Total member’s normal contributions **£**

Total member’s AVCs **£**

Current value of AVCs **£**

Single life AVC pension (per annum) payable immediately **£**

Joint life AVC pension (per annum) payable immediately **£**

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

Pre 06/04/1988

 GMP (per annum) **£**

Post 05/04/1988

 GMP (per annum) **£**

**Special circumstances / additional information**

Pension in payment at date of second event is £7,212.00 per annum.

Lower of 5% / RPI increases from date of first event to date of second event is 3.12%.

On retirement, Rina Purma commuted £2,266.12 per annum of pension in return for a tax-free cash sum of £31,272.46.

Rina Purma’s current available Lifetime Allowance is 93.52%.