**CASE STUDY DETAILS XYZ SCHEME QUESTION**

|  |  |  |  |
| --- | --- | --- | --- |
| **Event history**  Date of first event | **07/08/2010** | First event | **PRESERVED LEAVER** |
| Date of second event | **04/09/2020** | Second event | **RETIREMENT** |
| **Member details**  Surname | **BEDFORD** | Forenames | **JAMES** |
| Date of birth | **04/09/1955** | Gender | **MALE** |

|  |  |
| --- | --- |
| Spouse’s date of birth | **20/08/1952** |
| 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**

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **2012** | **2013** | **2014** | **2015** | **2016** | **2017** | **2018** | **2019** | **2020** |
|  |  |  |  |  |  |  |  |  |

**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) **£**

Contribution equivalent premium **£**

Certified amount **£**

# Special circumstances / additional information

Preserved pension (per annum) at date of first event **£ 7,460.40**

Lower of 5% / RPI increases from date of first event to date of second event is 35.50%.

James Bedford’s current available Lifetime Allowance is 72.44%.