**CASE STUDY DETAILS XYZ SCHEME QUESTION**

|  |  |  |  |
| --- | --- | --- | --- |
| **Event history**  Date of first event | **05/09/2020** | First event | **RETIREMENT** |
| Date of second event |  | Second event |  |
| **Member details**  Surname | **FOSTER** | Forenames | **JANE** |
| Date of birth | **05/09/1955** | Gender | **FEMALE** |

|  |  |
| --- | --- |
| Spouse’s date of birth | **16/11/1966** |
| 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** |
| **58,000** | **59,500** | **62,450** | **67,300** | **68,400** | **69,250** | **70,180** | **71,750** | **72,000** |

**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

Jane Foster’s Final Pensionable Salary at 3 July 2011 was £57,000.00

Lower of 5% / RPI increases from 4 July 2011 to date of first event is 28.9%.

On 31 August 2020, the Company (with the consent of the Trustees) awarded an augmented pension of £4,474.97 per annum to be paid to Jane Foster from her Normal Pension Date. The augmented pension is subject to the normal rules of the XYZ Pension & Life Assurance Scheme.

Jane Foster’s current available Lifetime Allowance is 83.40%.