**cASE STUDY DETAILS XYZ SCHEME LEAVERS PART 2**

# WITH SPECIAL

# CIRCUMSTANCES

**Event history**

Date of first event **07/09/2020** First event **LEAVER**

Date of second event Second event

**Member details**

Surname **BAXTER** Forenames **PAUL**

Date of birth **17/04/1965** Gender **MALE**

Spouse’s date of birth **12/10/1967**

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** |
|  |  |  |  |  |  |  |  |  |
| **43,000** | **44,000** | **45,350** | **46,700** | **47,900** | **49,000** | **51,500** | **52,600** | **53,950** |
|  |  |  |  |  |  |  |  |  |

**Contribution history**

Total member’s normal contributions **£**

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) **£**

**Special circumstances / additional information**

Paul Baxter’s Final Pensionable Salary at 3 July 2011 was £41,000.00.

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

On 8 February 2001, Paul Baxter transferred in his benefits from the non-contributory registered pension scheme of a previous employer. The Scheme Actuary calculated that the transfer value would buy a fixed pension in the XYZ Pension and Life Assurance Scheme of £2,728.00 per annum, which would be payable from Paul Baxter’s Normal Pension Date. The transferred-in pension is subject to the normal rules of the XYZ Pension and Life Assurance Scheme.

Paul Baxter’s reason for leaving was Voluntary.