CASE STUDY DETAILS XYZ SCHEME TRANSFERS

QUESTION 1

**Event history**

Date of first event **07/09/2020** First event **TRANSFER IN**

Date of second event Second event

**Member details**

Surname **EDGAR** Forenames **LESLIE**

Date of birth **10/12/1974** Gender **MALE**

Spouse's date of birth **06/07/1975**

Child dependent’s date of birth

Date of joining company **01/03/2014**

Date of joining scheme **01/04/2014**

Category of membership **A**

**Contribution history**

Total member's normal contributions **£ 6,387.28**

Total member’s AVCs **£**

Current value of AVCs **£**

**Preserved benefits from previous scheme**

Pension payable at age 65 (per annum) **£ 4,962.94**

Including:

* Pre 06/04/1988 GMP at age 65 (per annum) **£**
* Post 05/04/1988 GMP at age 65 (per annum) **£ 2,328.56**
* GMP at exit (per annum) **£ 624.00**

**Transfer value details from previous scheme**

Member’s total transfer value (including GMP liability) **£ 20,479.26**

Including:

* Member’s total contributions **£ 11,268.32**
* Transfer value in respect of post 05/04/1997 benefits **£ 8,749.72**
* Member’s post 05/04/1997 contributions **£ 6,879.98**

**Special circumstances / additional information**

Leslie Edgar is considering transferring in his benefits from the registered Defined Benefit arrangement of his previous employer.

Adjustment factor **0.99**

**TRANSFERS**

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