CASE STUDY DETAILS XYZ SCHEME TRANSFERS

QUESTION 3

**Event history**

Date of first event **11/06/2016** First event **PRESERVED LEAVER**

Date of second event **05/09/2020** Second event **TRANSFER OUT**

**Member details**

Surname **HANNE** Forenames **ANIKA**

Date of birth **17/03/1972** Gender **FEMALE**

Spouse's date of birth **14/06/1968**

Dependent child’s date of birth

Date of joining company **01/07/1994**

Date of joining scheme **01/08/1994**

Category of membership **A**

**Contribution history**

Total member's normal contributions **£ 18,736.42**

Post 05/04/1997 member’s normal contributions **£ 15,411.24**

Total member’s AVCs **£ 6,160.70**

Current value of AVCs **£ 8,716.59**

**Preserved benefits**

Member’s total pension at age 65 (per annum) **£ 12,976.13**

Including:

* Post 05/04/1997 pension at age 65 (per annum) **£ 10,438.26**
* Pre 06/04/1988 GMP at age 65 (per annum) **£ 0.00**
* Post 05/04/1988 GMP at age 65 (per annum) **£ 2,080.52**
* Total GMP at exit (per annum) **£ 1,189.24**

**Special circumstances / additional information**

Spouse’s pension on death after retirement (per annum) **£ 6,488.07**

Adjustment factor **1.01**

**TRANSFERS**

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