**CASE STUDY DETAILS RST SCHEME QUESTION**

# Event history

Date of first event **05/09/2021** First event **RETIREMENT**

Date of second event Second event

# Member details

Surname **RYDZ** Forenames **WARREN**

Date of birth **05/09/1956** Gender **MALE**

|  |  |
| --- | --- |
| Spouse’s date of birth | **23/03/1947** |
| Dependent child’s date of birth |  |
| Date of joining company | **11/11/1989** |
| Date of joining scheme | **06/04/1990** |

# Earnings history for the scheme year ending 5 April

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **2013** | **2014** | **2015** | **2016** | **2017** | **2018** | **2019** | **2020** | **2021** |
| **28,500** | **29,200** | **30,425** | **31,850** | **32,800** | **33,250** | **34,800** | **35,400** | **36,000** |

|  |  |
| --- | --- |
| **Contribution history** |  |
| Total member’s normal contributions | **£ 48,750.60** |
| Total member’s AVCs |  |
| Current value of AVCs |  |
| Single life AVC pension (per annum) payable immediately |  |
| Joint life AVC pension (per annum) payable immediately |  |

|  |  |
| --- | --- |
| **Pre 6 April 2006 pension accrued as at 5 April 2021**  CARE pension (per annum) | **£ 7,888.53** |
| **Post 5 April 2006 pension accrued as at 5 April 2021**  CARE pension (per annum) | **£ 5,377.94** |
| **Special circumstances / additional information**  Contractual Salary at date of first event | **£ 37,500.00** |
| Pro-rata CPI from 6 April 2021 to date of first event is 1.40%. |  |

In recognition of the fact that Warren Rydz took part in a special project, the Company (with the consent of the Trustees) has agreed to grant Warren Rydz an additional non-increasing single life pension of £1,500.00 per annum, which is to be excluded from the tax-free cash sum calculation.

Warren Rydz’s current available Lifetime Allowance is 85.78%.