**CASE STUDY DETAILS RST SCHEME QUESTION**

# Event history

Date of first event **02/11/2010** First event **PRESERVED LEAVER**

Date of second event **08/09/2021** Second event **RETIREMENT**

# Member details

Surname **DE SOUSA** Forenames **BEATRICE**

Date of birth **08/09/1956** Gender **FEMALE**

|  |  |
| --- | --- |
| Spouse’s date of birth | **05/11/1966** |
| Dependent child’s date of birth |  |
| Date of joining company | **09/09/1993** |
| Date of joining scheme | **06/04/1994** |

# Earnings history for the scheme year ending 5 April

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **2013** | **2014** | **2015** | **2016** | **2017** | **2018** | **2019** | **2020** | **2021** |
|  |  |  |  |  |  |  |  |  |

|  |  |
| --- | --- |
| **Contribution history** |  |
| Total member’s normal contributions | **£ 32,120.70** |
| 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) |  |
| **Post 5 April 2006 pension accrued as at 5 April 2021**  CARE pension (per annum) |  |
|  |  |

**Special circumstances / additional information**

Pre 6 April 2006 preserved CARE pension (per annum) at date **£ 5,216.04**

of first event

Post 5 April 2006 preserved CARE pension (per annum) at date **£ 712.09**

of first event

Lower of 5% / CPI increases from date of first event to date of second event is 29.8%.

Beatrice De Sousa’s current available Lifetime Allowance is 100.00%.