**CASE STUDY DETAILS XYZ SCHEME QUESTION**

|  |  |  |  |
| --- | --- | --- | --- |
| **Event history**  Date of first event | **07/09/2021** | First event | **RETIREMENT** |
| Date of second event |  | Second event |  |
| **Member details**  Surname | **BROWN** | Forenames | **ARTHUR** |
| Date of birth | **29/01/1964** | Gender | **MALE** |

|  |  |
| --- | --- |
| Spouse’s date of birth | **17/12/1962** |
| 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**

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **2013** | **2014** | **2015** | **2016** | **2017** | **2018** | **2019** | **2020** | **2021** |
| **76,200** | **78,200** | **81,200** | **83,250** | **86,100** | **87,750** | **88,450** | **90,250** | **92,400** |

**Contribution history**

Total member’s normal contributions **£**

Total member’s AVCs **£**

Current value of AVCs **£**

Single life AVC pension (per annum) payable immediately **£**

Joint life AVC pension (per annum) payable immediately **£**

# 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

Arthur Brown’s Final Pensionable Salary at 3 July 2011 was £73,600.75.

Lower of 5% / RPI increases from 4 July 2011 to date of first event is 33.6%.

On 5 August 1998, Arthur Brown transferred into the XYZ Pension and Life Assurance Scheme his non-contracted out benefits from the registered pension scheme of one of his former employers. The transfer in provided for additional Pensionable Service of 4 years and 150 days. The transferred-in benefits are subject to the normal rules of the XYZ Pension and Life Assurance Scheme.

Arthur Brown’s current available Lifetime Allowance is 100.00%.