**CASE STUDY DETAILS XYZ SCHEME QUESTION**

|  |  |  |  |
| --- | --- | --- | --- |
| **Event history**  Date of first event | **06/09/2021** | First event | **RETIREMENT** |
| Date of second event |  | Second event |  |
| **Member details**  Surname | **WHITE** | Forenames | **JAMES** |
| Date of birth | **06/09/1956** | Gender | **MALE** |

|  |  |
| --- | --- |
| Spouse’s date of birth | **22/04/1964** |
| 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** |
| **27,800** | **28,200** | **29,046** | **29,645** | **30,275** | **31,120** | **32,667** | **34,472** | **33,848** |

**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

James White’s Final Pensionable Salary at 3 July 2011 was £25,750.00.

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

James White’s current available Lifetime Allowance is 84.47%.