**CASE STUDY DETAILS XYZ SCHEME QUESTION**

|  |  |  |  |
| --- | --- | --- | --- |
| **Event history**  Date of first event | **11/09/2021** | First event | **ILL HEALTH** |
| Date of second event |  | Second event |  |
| **Member details**  Surname | **HENDERSON** | Forenames | **MARTHA** |
| Date of birth | **02/04/1965** | Gender | **FEMALE** |

|  |  |
| --- | --- |
| Spouse’s date of birth |  |
| Dependent child’s date of birth |  |
| Date of joining company | **01/03/1995** |
| Date of joining scheme | **01/04/1995** |
| Category of membership | **A** |

**Pensionable salary history for the scheme year commencing 6 April**

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **2013** | **2014** | **2015** | **2016** | **2017** | **2018** | **2019** | **2020** | **2021** |
| **33,850** | **35,500** | **37,150** | **38,250** | **38,575** | **39,430** | **40,430** | **40,915** | **40,520** |

**Contribution history**

Total member’s normal contributions **£ 47,260.88**

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) **£ 479.96**

# Special circumstances / additional information

Martha Henderson contributed at the default rate (70ths accrual) throughout her membership of the XYZ Pension and Life Assurance Scheme.

Martha Henderson’s current available Lifetime Allowance is 100.00%.