**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 | **NENTJES** | Forenames | **BERT** |
| Date of birth | **03/02/1963** | Gender | **MALE** |

|  |  |
| --- | --- |
| Spouse’s date of birth | **24/02/1966** |
| Dependent child’s date of birth |  |
| Date of joining company | **02/02/1994** |
| Date of joining scheme | **02/03/1994** |
| Category of membership | **A** |

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

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **2013** | **2014** | **2015** | **2016** | **2017** | **2018** | **2019** | **2020** | **2021** |
| **26,800** | **28,000** | **29,200** | **30,250** | **31,600** | **32,500** | **33,400** | **35,000** | **36,700** |

**Contribution history**

Total member’s normal contributions **£ 44,240.80**

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) **£ 524.16**

# Special circumstances / additional information

Bert Nentjes contributed to the XYZ Pension and Life Assurance Scheme at the default rate (70ths accrual) until 5 April 2014 and then contributed at the higher rate (60ths accrual) from 6 April 2014 onwards.

Bert Nentjes’ current available Lifetime Allowance is 100.00%.