|  |  |  |
| --- | --- | --- |
| **Worked Answer: XYZ (B)** |  | **Part 2 Leavers with Special Circumstances (Transfer In)** |
|  |  |  |  |
| **JOSH RILEY** | **MALE** |  |  |
| Member’s Date of Birth: | **05/11/1964** |  |  |
| Spouse’s Date of Birth: | **10/12/1968** |  |  |
| Normal Pension Date: | **05/11/2029** |  |  |
| Date of Joining Scheme: | **06/11/1997** |  |  |
| Date of Leaving: | **08/09/2021** |  |  |

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| Pensionable Service: | 13 | Years | 240 | Days | (06/11/1997 | - | 03/07/2011) |
|  |  |  |  |  |  |  |  |
| Revaluation to NPD: | 09/09/2021 to 05/11/2029 |  | 8 years @ 5% = | 1.47746 |

|  |  |  |
| --- | --- | --- |
| Pensionable Salary (1): | £56,200.00 | £56,200.00 (best 1 in 5 years, HIGHER) |
| Pensionable Salary (2): | £41,800.00 x 1.336 | £55,844.80 |

OPTIONS ON LEAVING: **PRESERVED PENSION / CETV**

|  |  |  |
| --- | --- | --- |
| **Member’s Pension at DOL**Post 97 Pension | £56,200.00 x (13 + (240/365)) x 1/60 | £12,792.56 |
| **Total**  |  | **£12,792.56** |
|  **… *Plus a fixed transferred-in pension of £3,625.14 per annum will be payable from NPD …*** |

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| --- |
| **Spouse’s / Civil Partner’s Pension at DOL** |
| Post 97 Pension | £12,792.56 x 50% | £ 6,396.28 |
| **Total** |  | **£ 6,396.28** |
|  |  |  |
| **Member’s Pension Revalued to NPD**  |
| Post 97 Pension  | £12,792.56 x 1.47746 | £18,900.50 |
| Transfer in Pension |  | £ 3,625.14 |
| **Total** |  | **£22,525.64** |
|  |  |  |
|  **Post Retirement Spouse’s / Civil Partner’s Pension Revalued to NPD** |
| Post 97  | £18,900.50 x 50% | £ 9,450.25 |
| Transfer in Pension  | £ 3,625.14 x 50% | £ 1,812.57 |
| **Total** |  | **£11,262.82** |