**cASE STUDY DETAILS XYZ SCHEME LEAVERS PART 2**

# WITH SPECIAL

# CIRCUMSTANCES

**Event history**

Date of first event **06/09/2021** First event **LEAVER**

Date of second event Second event

**Member details**

Surname **WATTS** Forenames **LILY**

Date of birth **27/11/1964** Gender **FEMALE**

Spouse’s date of birth **06/01/1962**

Dependent child’s date of birth **16/06/2003**

Date of joining company **01/11/1992**

Date of joining scheme **01/12/1992**

Category of membership **A**

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

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **2013** | **2014** | **2015** | **2016** | **2017** | **2018** | **2019** | **2020** | **2021** |
|  |  |  |  |  |  |  |  |  |
| **20,000** | **23,000** | **24,200** | **25,600** | **27,000** | **29,600** | **31,200** | **33,000** | **32,000** |
|  |  |  |  |  |  |  |  |  |

**Contribution history**

Total member’s normal contributions **£ 23,761.38**

Total member’s AVCs **£**

Current value of AVCs **£**

**Contracting-out details at date of first event**

Pre 06/04/1988

GMP (per annum) **£**

Post 05/04/1988

GMP (per annum) **£ 776.36**

**Special circumstances / additional information**

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

On 16 May 1994, Lily Watts transferred in her benefits from the registered pension scheme of one of her former employers. The Scheme Actuary calculated that the amount transferred in would secure a fixed pension of £1,346.00 per annum, which would be payable from Lily Watts’ Normal Pension Date. The transferred-in benefits are subject to the normal rules of the XYZ Pension and Life Assurance Scheme.

Lily Watts’ reason for leaving was Voluntary.

**LEAVERS 2**

# WITH SPECIAL CIRCUMSTANCES