CASE STUDY DETAILS XYZ SCHEME TRANSFERS

QUESTION 4

**Event history**

Date of first event **13/11/2006** First event **PRESERVED LEAVER**

Date of second event **01/09/2021** Second event **TRANSFER OUT**

**Member details**

Surname **BOMBELLES** Forenames **ZACHARY**

Date of birth **04/06/1961** Gender **MALE**

Spouse's date of birth **11/11/1965**

Dependent child’s date of birth

Date of joining company **15/05/1986**

Date of joining scheme **15/06/1986**

Category of membership **A**

**Contribution history**

Total member's normal contributions **£ 27,304.72**

Post 05/04/1997 member’s normal contributions **£ 15,961.03**

Total member’s AVCs **£ 0.00**

Current value of AVCs **£ 0.00**

**Preserved benefits**

Member’s total pension at age 65 (per annum) **£ 18,609.74**

Including:

* Post 05/04/1997 pension at age 65 (per annum) **£ 9,002.34**
* Pre 06/04/1988 GMP at age 65 (per annum) **£ 222.56**
* Post 05/04/1988 GMP at age 65 (per annum) **£ 2,294.24**
* Total GMP at exit (per annum) **£ 1,288.56**

**Special circumstances / additional information**

Spouse’s pension on death after retirement (per annum) **£ 9,304.87**

Adjustment factor **1.03**

**TRANSFERS**

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