CASE STUDY DETAILS XYZ SCHEME TRANSFERS

QUESTION 3

**Event history**

Date of first event **15/01/2017** First event **PRESERVED LEAVER**

Date of second event **02/09/2021** Second event **TRANSFER OUT**

**Member details**

Surname **BARNES** Forenames **LEXI**

Date of birth **26/06/1971** Gender **FEMALE**

Spouse's date of birth **16/04/1970**

Dependent child’s date of birth

Date of joining company **01/06/1996**

Date of joining scheme **01/07/1996**

Category of membership **A**

**Contribution history**

Total member's normal contributions **£ 21,637.24**

Post 05/04/1997 member’s normal contributions **£ 19,146.53**

Total member’s AVCs **£ 7,194.67**

Current value of AVCs **£ 11,604.33**

**Preserved benefits**

Member’s total pension at age 65 (per annum) **£ 13,765.30**

Including:

* Post 05/04/1997 pension at age 65 (per annum) **£ 12,432.40**
* Pre 06/04/1988 GMP at age 65 (per annum) **£ 0.00**
* Post 05/04/1988 GMP at age 65 (per annum) **£ 259.48**
* Total GMP at exit (per annum) **£ 133.12**

**Special circumstances / additional information**

Spouse’s pension on death after retirement (per annum) **£ 6,882.65**

Adjustment factor **1.03**

**TRANSFERS**

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