CASE STUDY DETAILS XYZ SCHEME TRANSFERS

QUESTION 2

**Event history**

Date of first event **05/09/2021** First event **TRANSFER IN**

Date of second event Second event

**Member details**

Surname **YORK** Forenames **VANESSA**

Date of birth **13/03/1965** Gender **FEMALE**

Spouse's date of birth **01/05/1966**

Child dependent’s date of birth

Date of joining company **01/07/2011**

Date of joining scheme **01/08/2011**

Category of membership **A**

**Contribution history**

Total member's normal contributions **£ 18,643.81**

Total member’s AVCs **£ 6,719.72**

Current value of AVCs **£ 9,894.51**

**Preserved benefits from previous scheme**

Pension payable at age 65 (per annum) **£ 9,785.74**

Including:

* Pre 06/04/1988 GMP at age 65 (per annum) **£ 112.32**
* Post 05/04/1988 GMP at age 65 (per annum) **£ 1,293.76**
* GMP at exit (per annum) **£ 520.52**

**Transfer value details from previous scheme**

Member’s total transfer value (including GMP liability) **£ 31,690.48**

Including:

* Member’s total contributions **£ 16,733.43**
* Transfer value in respect of post 05/04/1997 benefits **£ 8,649.21**
* Member’s post 05/04/1997 contributions **£ 5,101.88**

**Special circumstances / additional information**

Vanessa York’s transfer of benefits from the registered Defined Benefit arrangement of her previous employer has now been received.

Adjustment factor **0.99**

**TRANSFERS**

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