CASE STUDY DETAILS XYZ SCHEME TRANSFERS

QUESTION 1

**Event history**

Date of first event **03/09/2021** First event **TRANSFER IN**

Date of second event Second event

**Member details**

Surname **LI** Forenames **JIANG**

Date of birth **08/11/1974** Gender **MALE**

Spouse's date of birth **07/06/1976**

Child dependent’s date of birth

Date of joining company **01/05/2014**

Date of joining scheme **01/06/2014**

Category of membership **A**

**Contribution history**

Total member's normal contributions **£ 7,638.82**

Total member’s AVCs **£**

Current value of AVCs **£**

**Preserved benefits from previous scheme**

Pension payable at age 65 (per annum) **£ 4,898.52**

Including:

* Pre 06/04/1988 GMP at age 65 (per annum) **£**
* Post 05/04/1988 GMP at age 65 (per annum) **£ 2,210.52**
* GMP at exit (per annum) **£ 601.64**

**Transfer value details from previous scheme**

Member’s total transfer value (including GMP liability) **£ 23,046.22**

Including:

* Member’s total contributions **£ 8,734.93**
* Transfer value in respect of post 05/04/1997 benefits **£ 10,604.87**
* Member’s post 05/04/1997 contributions **£ 4,061.33**

**Special circumstances / additional information**

Chad White is considering transferring in his benefits from the registered Defined Benefit arrangement of his previous employer.

Adjustment factor **1.02**

**TRANSFERS**

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