**cASE STUDY DETAILS XYZ SCHEME DEATHS**

**Event history**

Date of first event **25/08/2021** First event **DEATH**

Date of second event Second event

**Member details**

Surname **BATTHEW** Forenames **MARK**

Date of birth **04/09/1952** Gender **MALE**

Spouse’s date of birth **21/11/1954**

Child dependant date of birth

Date of joining company **11/04/1987**

Date of joining scheme **11/05/1987**

Category of membership **A**

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

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **2013** | **2014** | **2015** | **2016** | **2017** | **2018** | **2019** | **2020** | **2021** |
|  |  |  |  |  |  |  |  |  |
| **31,000** | **32,240** | **33,272** | **34,303** | **35,676** | **37,103** | **38,123** | **40,121** | **41,726** |
|  |  |  |  |  |  |  |  |  |

**Contribution history**

Total member’s normal contributions **£ 25,885.12**

Total member’s AVCs **£**

Current value of AVCs **£**

Single life AVC pension (per annum) payable immediately **£**

Joint life AVC pension (per annum) payable immediately **£**

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

Pre 06/04/1988

GMP (per annum) **£** **216.32**

Post 05/04/1988

GMP (per annum) **£ 1,853.28**

**Special circumstances / additional information**

Salary at date of first event **£ 42,187.32**

Mark Batthew paid the default contribution rate (70ths accrual) from the date he joined the XYZ Pension and Life Assurance Scheme.

On 4 September 2017, the Company (with the consent of the Trustees) agreed that, in the event of Mark Batthew’s death, the percentage rate for his spouse’s pension would be augmented to 62.50%

Mark Batthew’s current available Lifetime Allowance is 77.21%.