**cASE STUDY DETAILS XYZ SCHEME DEATHS**

**Event history**

Date of first event  **15/10/2019** First event **RETIREMENT**

Date of second event **26/08/2021** Second event **DEATH**

**Member details**

Surname **DUYI**  Forenames **JIANG**

Date of birth **01/02/1959** Gender **MALE**

Spouse’s date of birth **18/05/1957**

Dependant’s date of birth

Date of joining company **15/02/1985**

Date of joining scheme **15/03/1985**

Category of membership **A**

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

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **2013** | **2014** | **2015** | **2016** | **2017** | **2018** | **2019** | **2020** | **2021** |
|  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |

**Contribution history**

Total member’s normal contributions **£**

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) **£**

Post 05/04/1988

 GMP (per annum) **£**

**Special circumstances / additional information**

Pension in payment at date of second event is £12,642.58 per annum, which is split as follows:

 Excess pension (per annum) **£ 9,822.10**

 Pre 6 April 1988 GMP (per annum) **£ 420.68**

 Post 5 April 1988 GMP (per annum) **£ 2,399.80**

Lower of 5.0% / RPI increases from date of first event to date of second event is 2.1%.

On retirement, Jiang Duyi commuted £2,096.58 per annum of pension in return for a tax-free cash sum of £31,113.25.

Jiang Duyi ’s current available Lifetime Allowance is 87.41%.