**cASE STUDY DETAILS RST SCHEME DEATHS PART 1**

**Event history**

Date of first event **29/11/2019** First event **RETIREMENT**

Date of second event **07/09/2022** Second event **DEATH**

**Member details**

Surname **PEREZ** Forenames **ANDRIK**

Date of birth **29/09/1959** Gender **MALE**

Spouse date of birth **22/06/1968**

Child dependant date of birth **14/03/2007**

Date of joining company **21/03/1998**

Date of joining scheme **06/04/1998**

**Earnings history for the scheme year ending 5 April**

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **2014** | **2015** | **2016** | **2017** | **2018** | **2019** | **2020** | **2021** | **2022** |
|  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |

**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 **£**

**Pre 6 April 2006 pension accrued as at 5 April 2022**

CARE pension (per annum) **£**

**Post 5 April 2006 pension accrued as at 5 April 2022**

CARE pension (per annum) **£**

**Special circumstances / additional information**

The pension in payment at date of second event is £21,234.12per annum, which is split as follows:

 Pre 6 April 2006 pension (per annum) **£ 8,872.21**

 Post 5 April 2006 pension (per annum) **£ 12,361.91**

Lower of 5.0% / RPI increases from date of first event to date of second event is 8.4%.

Lower of 2.5% / RPI increases from date of first event to date of second event is 5.2%.

On retirement, Andrik Perez commuted £2,824.12 per annum of pension in return for a tax-free cash sum of £42,248.84, split as follows:

 Pre 6 April 2006 commuted pension (per annum) **£**

 Post 5 April 2006 commuted pension (per annum) **£ 2,824.12**

Andrik Perez’s current available Lifetime Allowance is 76.25%.

**DEATHS 1**