**CASE STUDY DETAILS XYZ SCHEME QUESTION**

|  |  |  |  |
| --- | --- | --- | --- |
| **Event history**Date of first event | **02/09/2022** | First event | **ILL HEALTH** |
| Date of second event |  | Second event |  |
| **Member details**Surname | **MELON** | Forenames | **CHARLES** |
| Date of birth | **29/09/1966** | Gender | **MALE** |

|  |  |
| --- | --- |
| Spouse’s date of birth | **10/02/1966** |
| Dependent child’s date of birth |  |
| Date of joining company | **04/02/1991** |
| Date of joining scheme | **04/03/1991** |
| Category of membership | **A** |

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

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **2014** | **2015** | **2016** | **2017** | **2018** | **2019** | **2020** | **2021** | **2022** |
| **35,000** | **37,200** | **39,800** | **42,000** | **44,100** | **46,250** | **49,100** | **52,125** | **51,950** |

**Contribution history**

Total member’s normal contributions **£ 52,411.88**

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) **£ 1,315.08**

Contribution equivalent premium **£**

Certified amount **£**

# Special circumstances / additional information

Charles Melon paid the default contribution rate (70ths accrual) throughout his period of membership of the XYZ Pension & Life Assurance Scheme.

Charles Melon’s current available Lifetime Allowance is 100.00%.