**CASE STUDY DETAILS XYZ SCHEME QUESTION**

|  |  |  |  |
| --- | --- | --- | --- |
| **Event history**  Date of first event | **01/09/2022** | First event | **RETIREMENT** |
| Date of second event |  | Second event |  |
| **Member details**  Surname | **WILLOW** | Forenames | **PERCIVAL** |
| Date of birth | **11/07/1963** | Gender | **MALE** |

|  |  |
| --- | --- |
| Spouse’s date of birth | **10/04/1965** |
| Dependent child’s date of birth |  |
| Date of joining company | **06/11/1997** |
| Date of joining scheme | **06/11/1997** |
| Category of membership | **B** |

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

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **2014** | **2015** | **2016** | **2017** | **2018** | **2019** | **2020** | **2021** | **2022** |
| **43,000** | **46,500** | **49,280** | **51,800** | **53,250** | **55,750** | **58,000** | **60,600** | **59,900** |

**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) **£**

Contribution equivalent premium **£**

Certified amount **£**

# Special circumstances / additional information

Percival Willow’s Final Pensionable Salary at 3 July 2011 was £39,950.00

Lower of 5.0% / RPI increases from 4 July 2011 to date of first event is 33.9%.

Percival Willow’s current available Lifetime Allowance is 100.00%.