CASE STUDY DETAILS XYZ SCHEME TRANSFERS

QUESTION 4

**Event history**

Date of first event **11/03/2006** First event **PRESERVED LEAVER**

Date of second event **05/09/2022** Second event **TRANSFER OUT**

**Member details**

Surname **KERR**  Forenames **SAMUEL**

Date of birth **16/09/1962** Gender **MALE**

Spouse's date of birth **10/10/1964**

Dependent child’s date of birth

Date of joining company **17/06/1987**

Date of joining scheme **17/07/1987**

Category of membership **A**

**Contribution history**

Total member's normal contributions **£ 29,403.27**

Post 05/04/1997 member’s normal contributions **£ 14,956.33**

Total member’s AVCs **£ 0.00**

Current value of AVCs **£ 0.00**

**Preserved benefits**

Member’s total pension at age 65 (per annum) **£ 19,869.42**

Including:

* Post 05/04/1997 pension at age 65 (per annum) **£ 10,004.28**
* Pre 06/04/1988 GMP at age 65 (per annum) **£ 218.92**
* Post 05/04/1988 GMP at age 65 (per annum) **£ 2,145.00**
* Total GMP at exit (per annum) **£ 1,115.92**

**Special circumstances / additional information**

Spouse’s pension on death after retirement (per annum) **£ 9,934.71**

Adjustment factor **1.01**

**TRANSFERS**

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