CASE STUDY DETAILS XYZ SCHEME TRANSFERS

 QUESTION 3

**Event history**

Date of first event **31/03/2017** First event **PRESERVED LEAVER**

Date of second event **03/09/2022** Second event **TRANSFER OUT**

**Member details**

Surname **WALTERS** Forenames **EMMA**

Date of birth **19/04/1970** Gender **FEMALE**

Spouse's date of birth **04/06/1969**

Dependent child’s date of birth

Date of joining company **01/06/1996**

Date of joining scheme **01/07/1996**

Category of membership **A**

**Contribution history**

Total member's normal contributions **£ 22,243.76**

Post 05/04/1997 member’s normal contributions **£ 20,948.52**

Total member’s AVCs **£ 8,971.65**

Current value of AVCs **£ 12,642.84**

**Preserved benefits**

Member’s total pension at age 65 (per annum) **£14,673.50**

Including:

* Post 05/04/1997 pension at age 65 (per annum) **£13,046.77**
* Pre 06/04/1988 GMP at age 65 (per annum) **£ 0.00**
* Post 05/04/1988 GMP at age 65 (per annum) **£ 238.16**
* Total GMP at exit (per annum) **£ 128.96**

**Special circumstances / additional information**

Spouse’s pension on death after retirement (per annum) **£ 7,336.75**

Adjustment factor **1.02**

 **TRANSFERS**

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