CASE STUDY DETAILS XYZ SCHEME TRANSFERS

QUESTION 1

**Event history**

Date of first event **04/09/2022** First event **TRANSFER IN**

Date of second event Second event

**Member details**

Surname **WU** Forenames **CHANG**

Date of birth **11/08/1973** Gender **MALE**

Spouse's date of birth **17/01/1975**

Child dependent’s date of birth

Date of joining company **01/02/2015**

Date of joining scheme **01/03/2015**

Category of membership **A**

**Contribution history**

Total member's normal contributions **£ 8,321.47**

Total member’s AVCs **£**

Current value of AVCs **£**

**Preserved benefits from previous scheme**

Pension payable at age 65 (per annum) **£ 4,382.64**

Including:

* Pre 06/04/1988 GMP at age 65 (per annum) **£**
* Post 05/04/1988 GMP at age 65 (per annum) **£ 2,056.08**
* GMP at exit (per annum) **£ 593.84**

**Transfer value details from previous scheme**

Member’s total transfer value (including GMP liability) **£ 24,602.78**

Including:

* Member’s total contributions **£ 9,339.74**
* Transfer value in respect of post 05/04/1997 benefits **£ 9,708.92**
* Member’s post 05/04/1997 contributions **£ 4,644.42**

**Special circumstances / additional information**

Chang Wu is considering transferring in his benefits from the registered Defined Benefit arrangement of his previous employer.

Adjustment factor **1.01**

**TRANSFERS**

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