**CASE STUDY DETAILS XYZ SCHEME QUESTION**

|  |  |  |  |
| --- | --- | --- | --- |
| **Event history**  Date of first event | **13/09/2023** | First event | **ILL HEALTH** |
| Date of second event |  | Second event |  |
| **Member details**  Surname | **KRCMAR** | Forenames | **FREDERICK** |
| Date of birth | **14/06/1961** | Gender | **MALE** |

|  |  |
| --- | --- |
| Spouse’s date of birth | **13/07/1964** |
| Child dependant’s date of birth |  |
| Date of joining company | **26/02/1993** |
| Date of joining scheme | **26/03/1993** |
| Category of membership | **A** |

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

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **2015** | **2016** | **2017** | **2018** | **2019** | **2020** | **2021** | **2022** | **2023** |
|  |  |  |  |  |  |  |  |  |
| **36,000** | **37,200** | **38,300** | **40,000** | **41,850** | **42,630** | **43,900** | **42,000** | **42,000** |
|  |  |  |  |  |  |  |  |  |

**Contribution history**

Total member’s normal contributions **£ 52,440.66**

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) **£ 697.84**

# Special circumstances / additional information

Frederick Krcmar contributed at the default rate (70ths accrual) throughout his membership of the XYZ Pension and Life Assurance Scheme.

Frederick Krcmar’s current available Lifetime Allowance is 100.00%.