**CASE STUDY DETAILS XYZ SCHEME QUESTION**

|  |  |  |  |
| --- | --- | --- | --- |
| **Event history**Date of first event | **11/09/2023** | First event | **RETIREMENT** |
| Date of second event |  | Second event |  |
| **Member details**Surname | **ROCK** | Forenames | **JESSICA** |
| Date of birth | **19/01/1956** | Gender | **FEMALE** |

|  |  |
| --- | --- |
| Spouse’s date of birth | **14/08/1954** |
| Child dependant’s date of birth |  |
| Date of joining company | **20/11/1986** |
| Date of joining scheme | **20/12/1986** |
| Category of membership | **A** |

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

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **2015** | **2016** | **2017** | **2018** | **2019** | **2020** | **2021** | **2022** | **2023** |
|  |  |  |  |  |  |  |  |  |
| **39,000** | **41,350** | **44,200** | **46,100** | **48,230** | **50,255** | **54,300** | **55,000** | **55,750** |
|  |  |  |  |  |  |  |  |  |

**Contribution history**

Total member’s normal contributions **£ 76,220.48**

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) **£ 579.80**

Post 05/04/1988

GMP (per annum) **£ 3,252.08**

# Special circumstances / additional information

Jessica Rock contributed at the default rate (70ths accrual) throughout her membership of the XYZ Pension and Life Assurance Scheme.

Jessica Rock’s current available Lifetime Allowance is 94.78%.