**CASE STUDY DETAILS XYZ SCHEME QUESTION**

|  |  |  |  |
| --- | --- | --- | --- |
| **Event history**  Date of first event | **10/09/2023** | First event | **RETIREMENT** |
| Date of second event |  | Second event |  |
| **Member details**  Surname | **RODRIGUEZ** | Forenames | **ROSY-JESS** |
| Date of birth | **19/03/1955** | Gender | **FEMALE** |

|  |  |
| --- | --- |
| Spouse’s date of birth | **03/04/1953** |
| Child dependant’s date of birth |  |
| Date of joining company | **06/11/1997** |
| Date of joining scheme | **06/11/1997** |
| Category of membership | **B** |

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

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **2015** | **2016** | **2017** | **2018** | **2019** | **2020** | **2021** | **2022** | **2023** |
|  |  |  |  |  |  |  |  |  |
| **64,000** | **66,100** | **71,000** | **73,250** | **74,900** | **76,850** | **78,245** | **79,075** | **76,600** |
|  |  |  |  |  |  |  |  |  |

**Contribution history**

Total member’s normal contributions **£**

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) **£**

# Special circumstances / additional information

Rosy-Jess Rodriguez’s Final Pensionable Salary at 3 July 2011 was £57,560.00.

Lower of 5.0% and RPI increases from 4 July 2011 to Normal Pension Date is 25.8%.

Rosy-Jess Rodriguez reduced her working hours from full time (five days a week) to three days a week for the period from 18 February 2006 to 16 March 2009, inclusive. From 17 March 2009, Rosy-Jess Rodriguez reduced her working week to two days.

Rosy-Jess Rodriguez’s current available Lifetime Allowance is 91.46%.