**CASE STUDY DETAILS XYZ SCHEME QUESTION**

|  |  |  |  |
| --- | --- | --- | --- |
| **Event history**  Date of first event | **31/08/2011** | First event | **PRESERVED LEAVER** |
| Date of second event | **14/09/2023** | Second event | **RETIREMENT** |
| **Member details**  Surname | **RODRIGUEZ** | Forenames | **ROWBY-JAKE** |
| Date of birth | **14/09/1958** | Gender | **MALE** |

|  |  |
| --- | --- |
| Spouse’s date of birth | **26/04/1959** |
| 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** |
|  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |

**Contribution history**

Total member’s normal contributions **£**

Total member’s AVCs **£ 29,880.00**

Current value of AVCs **£ 40,221.28**

Single life AVC pension (per annum) payable immediately **£ 2,162.44**

Joint life AVC pension (per annum) payable immediately **£ 1,733.68**

# 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

Preserved pension (per annum) at date of first event **£ 9,201.31**

Lower of 5.0% and RPI increases from date of first event to date of second event is 40.1%.

In the event of taking the tax-free cash sum, Rowby-Jake Rodriguez has advised that the value of his AVCs should be taken as a cash sum first before commuting any other benefits.

Rowby-Jake Rodriguez’s current available Lifetime Allowance is 86.01%.