**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 | **RODRIGUEZ** | Forenames | **ROXY-JADE** |
| Date of birth | **21/03/1964** | Gender | **FEMALE** |

|  |  |
| --- | --- |
| Spouse’s date of birth | **12/04/1961** |
| 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** |
|  |  |  |  |  |  |  |  |  |
| **74,000** | **76,200** | **79,000** | **82,150** | **83,900** | **86,170** | **89,185** | **92,110** | **95,000** |
|  |  |  |  |  |  |  |  |  |

**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

Roxy-Jade Rodriguez’s Final Pensionable Salary at 3 July 2011 was £68,496.57.

Lower of 5.0% and RPI increases from 4 July 2011 to date of first event is 39.9%.

On 18 September 2001, Roxy-Jade Rodriguez transferred into the XYZ Pension and Life Assurance Scheme her non-contracted out benefits from the registered pension scheme of one of her former employers. The transfer in secured 6 years and 299 days of additional Pensionable Service in the XYZ Pension and Life Assurance Scheme. The transferred-in benefits are subject to the normal rules of the XYZ Pension and Life Assurance Scheme.

Roxy-Jade Rodriguez’s current available Lifetime Allowance is 100.00%.