**cASE STUDY DETAILS XYZ SCHEME DEATHS PART 1**

# 

**Event history**

Date of first event **21/06/2020** First event **RETIREMENT**

Date of second event **30/08/2023** Second event **DEATH**

**Member details**

Surname **TILEN** Forenames **ANNA**

Date of birth **21/06/1954** Gender **FEMALE**

Spouse’s date of birth **18/11/1958**

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 **£**

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**

Pension in payment at date of second event is £11,053.07 per annum.

Lower of 5.0% / RPI increases from date of first event to date of second event is 14.7%.

On retirement, Anna Tilen commuted £3,733.28 per annum of pension in return for a tax-free cash sum of 75,710.92

Anna Tilen’s current available Lifetime Allowance is 89.31%.