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

**Event history**

Date of first event **11/06/2020** First event **RETIREMENT**

Date of second event **04/09/2023** Second event **DEATH**

**Member details**

Surname **TILSON** Forenames **SIMON**

Date of birth **23/09/1958** Gender **MALE**

Spouse’s date of birth **12/03/1965**

Child dependant’s date of birth

Date of joining company **13/10/1986**

Date of joining scheme **13/11/1986**

Category of membership **A**

**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 £31,326.88per annum, which is split as follows:

 Excess pension (per annum) **£ 28,968.16**

 Pre 6 April 1988 GMP (per annum) **£ 218.40**

 Post 5 April 1988 GMP (per annum) **£ 2,140.32**

Lower of 5.0% / RPI increases from date of first event to date of second event is 12.1%.

On retirement, Simon Tilson commuted £9,632.51 per annum of pension in return for a tax-free cash sum of £239,464.20.

Simon Tilson’s current available Lifetime Allowance is 84.27%.

 **DEATHS 1**