**cASE STUDY DETAILS XYZ SCHEME DEATHS PART 2**

**Event history**

Date of first event **07/05/2021** First event **RETIREMENT**

Date of second event **01/09/2023** Second event **DEATH**

**Member details**

Surname **HUNTER** Forenames **ABIGAIL**

Date of birth **07/05/1957** Gender **FEMALE**

Spouse’s date of birth **24/08/1955**

Child dependant’s date of birth

Date of joining company **18/06/1984**

Date of joining scheme **18/07/1984**

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 £21,444.28per annum, which is split as follows:

 Excess pension (per annum) **£ 16,339.96**

 Pre 6 April 1988 GMP (per annum) **£ 342.16**

 Post 5 April 1988 GMP (per annum) **£ 4,762.16**

Lower of 5.0% / RPI increases from date of first event to date of second event is 10.3%.

On retirement, Abigail Hunter commuted £5,154.22 per annum of pension in return for a tax-free cash sum of £119,474.82.

At the date of the second event, Abigail Hunter was receiving a joint-life AVC pension of £2,172.16 per annum. The AVC pension is not included in the figures stated above.

Abigail Hunter’s current available Lifetime Allowance is 67.28%.

 **DEATHS 2**