CASE STUDY DETAILS XYZ SCHEME TRANSFERS

QUESTION 1

**Event history**

Date of first event **04/09/2023** First event **TRANSFER IN**

Date of second event Second event

**Member details**

Surname **FISHER** Forenames **IAN**

Date of birth **15/08/1974** Gender **MALE**

Spouse's date of birth **17/01/1976**

Child dependent’s date of birth

Date of joining company **01/02/2016**

Date of joining scheme **01/03/2016**

Category of membership **A**

**Contribution history**

Total member's normal contributions **£ 8,924.76**

Total member’s AVCs **£**

Current value of AVCs **£**

**Preserved benefits from previous scheme**

Pension payable at age 65 (per annum) **£ 5,302.42**

Including:

* Pre 06/04/1988 GMP at age 65 (per annum) **£**
* Post 05/04/1988 GMP at age 65 (per annum) **£ 2,058.16**
* GMP at exit (per annum) **£ 604.76**

**Transfer value details from previous scheme**

Member’s total transfer value (including GMP liability) **£ 26,020.82**

Including:

* Member’s total contributions **£ 9,369.78**
* Transfer value in respect of post 05/04/1997 benefits **£ 12,085.28**
* Member’s post 05/04/1997 contributions **£ 5,545.32**

**Special circumstances / additional information**

Ian Fisher is considering transferring in his benefits from the registered Defined Benefit arrangement of his previous employer.

Adjustment factor **1.01**

**TRANSFERS**

**QUESTION 1**