CASE STUDY DETAILS XYZ SCHEME TRANSFERS

QUESTION 2

**Event history**

Date of first event **06/09/2023** First event **TRANSFER IN**

Date of second event Second event

**Member details**

Surname **DANCE** Forenames **SARAH**

Date of birth **22/04/1964** Gender **FEMALE**

Spouse's date of birth **02/10/1963**

Child dependent’s date of birth

Date of joining company **01/09/2013**

Date of joining scheme **01/10/2013**

Category of membership **A**

**Contribution history**

Total member's normal contributions **£ 22,800.28**

Total member’s AVCs **£ 5,888.26**

Current value of AVCs **£ 10,465.73**

**Preserved benefits from previous scheme**

Pension payable at age 65 (per annum) **£ 3,523.95**

Including:

* Pre 06/04/1988 GMP at age 65 (per annum) **£ 113.36**
* Post 05/04/1988 GMP at age 65 (per annum) **£ 285.48**
* GMP at exit (per annum) **£ 294.32**

**Transfer value details from previous scheme**

Member’s total transfer value (including GMP liability) **£ 39,612.41**

Including:

* Member’s total contributions **£ 14,348.62**
* Transfer value in respect of post 05/04/1997 benefits **£ 30,009.26**
* Member’s post 05/04/1997 contributions **£ 11,795.62**

**Special circumstances / additional information**

Sarah Dance’s transfer of benefits from the registered Defined Benefit arrangement of her previous employer has now been received.

Adjustment factor **1.02**

**TRANSFERS**

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