**cASE STUDY DETAILS XYZ SCHEME LEAVERS**

**[WITH SPECIAL**

**CIRCUMSTANCES]**

**Event history**

Date of first event **09/09/2024** First event **LEAVER**

Date of second event Second event

**Member details**

Surname **COOPER** Forenames **EMMA**

Date of birth **12/02/1968** Gender **FEMALE**

Spouse’s date of birth **01/11/1966**

Child dependant’s date of birth **18/08/2006**

Date of joining company **01/11/1995**

Date of joining scheme **01/12/1995**

Category of membership **A**

**Pensionable salary history for the scheme year commencing 6 April**

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **2016** | **2017** | **2018** | **2019** | **2020** | **2021** | **2022** | **2023** | **2024** |
|  |  |  |  |  |  |  |  |  |
| **26,000** | **28,500** | **29,500** | **31,900** | **34,200** | **36,500** | **38,800** | **41,600** | **38,000** |
|  |  |  |  |  |  |  |  |  |

**Contribution history**

Total member’s normal contributions **£ 49,727.60**

Total member’s AVCs **£**

Current value of AVCs **£**

**Contracting-out details at date of first event**

Pre 06/04/1988

GMP (per annum) **£**

Post 05/04/1988

GMP (per annum) **£ 628.16**

**Special circumstances / additional information**

Emma Cooper contributed at the default rate (70ths accrual) throughout her membership of the XYZ Pension and Life Assurance Scheme.

On 3 March 1997, Emma Cooper transferred in her benefits from the non-contributory registered pension scheme of one of her former employers. The Scheme Actuary calculated that the amount transferred in would secure a fixed pension of £965.00 per annum, which would be payable from Emma Cooper’s Normal Pension Date. The transferred-in benefits are subject to the normal rules of the XYZ Pension and Life Assurance Scheme.

Emma Cooper’s reason for leaving was resignation.