**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 **WILLIAMS** Forenames **BARNABY**

Date of birth **24/05/1963** Gender **MALE**

Spouse’s date of birth **29/01/1967**

Child dependant’s date of birth

Date of joining company **06/11/1997**

Date of joining scheme **06/11/1997**

Category of membership **B**

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

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **2016** | **2017** | **2018** | **2019** | **2020** | **2021** | **2022** | **2023** | **2024** |
|  |  |  |  |  |  |  |  |  |
| **43,200** | **43,900** | **47,000** | **49,800** | **53,000** | **55,800** | **57,600** | **59,800** | **62,000** |
|  |  |  |  |  |  |  |  |  |

**Contribution history**

Total member’s normal contributions **£**

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) **£**

**Special circumstances / additional information**

Barnaby Williams’ Final Pensionable Salary at 3 July 2011 was £41,000.00.

Lower of 5.0% or RPI increases from 4 July 2011 to date of first event is 48.7%.

On 15 June 2004, Barnaby Williams transferred in his benefits from the non-contributory registered pension scheme of a previous employer. The Scheme Actuary calculated that the transfer value would buy a fixed pension in the XYZ Pension and Life Assurance Scheme of £2,061.25 per annum, which would be payable from Barnaby Williams’ Normal Pension Date. The transferred-in pension is subject to the normal rules of the XYZ Pension and Life Assurance Scheme.

Barnaby Williams’ reason for leaving was resignation.