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**cASE STUDY DETAILS XYZ SCHEME DEATHS**

**Event history**

Date of first event **21/06/2016** First event **PRESERVED LEAVER**

Date of second event **12/09/2024** Second event **DEATH**

**Member details**

Surname **ROBERTS** Forenames **WESLEY**

Date of birth **09/05/1969** Gender **MALE**

Spouse’s date of birth **11/08/1970**

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** |
|  |  |  |  |  |  |  |  |  |

**Contribution history**

Total member’s normal contributions **£**

Total member’s AVCs **£ 15,666.68**

Current value of AVCs **£ 21,829.09**

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**

Preserved pension (per annum) at date of first event **£ 7,199.99**

Lower of 5.0% or RPI increases from date of first event to date of second event is 27.6%.

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Wesley Roberts’ current available Lump Sum & Death Benefit Allowance (‘LS&DBA’) is £1,073,100.00.