**CASE STUDY DETAILS XYZ SCHEME RETIREMENTS**

**Event history**

Date of first event **14/09/2024** First event **RETIREMENT**

Date of second event Second event

**Member details**

Surname **MOORE** Forenames **SPENCER**

Date of birth **14/09/1959** Gender **MALE**

Spouse’s date of birth **10/06/1962**

Child dependant’s date of birth

Date of joining company **17/03/1992**

Date of joining scheme **17/04/1992**

Category of membership **A**

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

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **2016** | **2017** | **2018** | **2019** | **2020** | **2021** | **2022** | **2023** | **2024** |
| **55,000** | **56,900** | **59,870** | **61,400** | **64,925** | **67,420** | **68,500** | **69,999** | **68,250** |

**Contribution history**

Total member’s normal contributions **£ 67,947.88**

Total member’s AVCs **£**

Current value of AVCs **£**

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) **£ 1,901.12**

Contribution equivalent premium **£**

Certified amount **£**

# Special circumstances / additional information

Spencer Moore paid the default contribution rate (70ths accrual) throughout his period of membership of the XYZ Pension & Life Assurance Scheme.

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

Spencer Moore’s current available Lump Sum Allowance (‘LSA’) is £268,275.00.