**CASE STUDY DETAILS XYZ SCHEME RETIREMENTS**

**Event history**

Date of first event **15/09/2024** First event **RETIREMENT**

Date of second event Second event

**Member details**

Surname **PETERS** Forenames **PETULA**

Date of birth **15/09/1959** Gender **FEMALE**

Spouse’s date of birth **18/02/1959**

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** |
| **72,000** | **75,000** | **78,140** | **80,340** | **82,500** | **85,325** | **87,190** | **88,925** | **89,880** |

**Contribution history**

Total member’s normal contributions **£**

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) **£**

Contribution equivalent premium **£**

Certified amount **£**

# Special circumstances / additional information

Petula Peters’ Final Pensionable Salary at 3 July 2011 was £64,444.00

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

On 12 September 2003, Petula Peters transferred in to the XYZ Pension and Life Assurance Scheme (the “Scheme”) the non-contracted-out benefits from the registered pension scheme of one of her former employers. The transferred-in benefits secured Petula Peters with a pension from the Scheme of £2,641.22 per annum to be paid from her Normal Pension Date. The transfer in is subject to the normal rules of the Scheme.

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

Petula Peters’ current available Lump Sum Allowance (‘LSA’) is £268,275.00.