

**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**

| <b>2016</b> | <b>2017</b> | <b>2018</b> | <b>2019</b> | <b>2020</b> | <b>2021</b> | <b>2022</b> | <b>2023</b> | <b>2024</b> |
|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|
|             |             |             |             |             |             |             |             |             |

**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%.

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