## **CASE STUDY DETAILS**

## **XYZ SCHEME**

## **RETIREMENTS**

# **Event history**

Date of first event 12/09/2024 First event ILL HEALTH

Date of second event Second event

## Member details

Surname BANKS Forenames ALISON

Date of birth 20/07/1968 Gender FEMALE

Spouse's date of birth 14/02/1966

Child dependant's date of birth

Date of joining company 08/01/1992

Date of joining scheme 08/02/1992

Category of membership A

# Pensionable salary history for the scheme year commencing 6 April

2016	2017	2018	2019	2020	2021	2022	2023	2024
37,000	39,400	41,600	44,100	47,250	49,150	51,700	54,625	56,200

# **Contribution history**

Total member's normal contributions £ 59,220.60

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) £ 1,699.88

Contribution equivalent premium £

Certified amount £

# Special circumstances / additional information

Alison Banks paid the default contribution rate (70ths accrual) throughout her period of membership of the XYZ Pension & Life Assurance Scheme.

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

Alison Banks' current available Lump Sum Allowance ('LSA') is £268,275.00.