### **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 WILSON Forenames PATRICIA

Date of birth 18/09/1958 Gender FEMALE

Spouse's date of birth

Child dependant's date of birth

Date of joining company 22/10/1988

Date of joining scheme 22/11/1988

Category of membership A

# Pensionable salary history for the scheme year commencing 6 April

2016	2017	2018	2019	2020	2021	2022	2023	2024
73,000	75,400	77,700	80,000	82,280	84,500	86,000	87,750	88,500

# **Contribution history**

Total member's normal contributions £ 102,660.80

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) £ 4,026.88

Contribution equivalent premium £

Certified amount £

# Special circumstances / additional information

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

Patricia Wilson worked full-time (5 days a week) from the date she joined the Company until 23 May 2005. Patricia Wilson then reduced her working week as follows:

• 24 May 2005 until 31 December 2014 = 4.0 days per week

• 1 January 2015 onwards = 2.0 days per week

Patricia Wilson's current available Lump Sum & Death Benefit Allowance ('LS&DBA') is £1,038,250.00.

Patricia Wilson's current available Lump Sum Allowance ('LSA') is £233,425.00.