CASE STUDY DETAILS

XYZ SCHEME

RETIREMENTS

Event history

Date of first event 07/02/2015 First event PRESERVED LEAVER

Date of second event 13/09/2024 Second event RETIREMENT

Member details

Surname CHARLTON Forenames WILLIAM

Date of birth 13/09/1959 Gender MALE

Spouse's date of birth

Child dependant's date of birth

Date of joining company 19/07/1990

Date of joining scheme 19/08/1990

Category of membership **A**

Pensionable salary history for the scheme year commencing 6 April

2016	2017	2018	2019	2020	2021	2022	2023	2024

Contribution history

Total member's normal contributions £ 41,220.00

Total member's AVCs £ 38,360.00

Current value of AVCs £ 51,621.18

Single life AVC pension (per annum) payable immediately £ 2,731.28

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) £ 2,465.84

Contribution equivalent premium £

Certified amount £

Special circumstances / additional information

Preserved pension (per annum) at date of first event £ 7,922.99

Lower of 5.0% or RPI increases from date of first event to date of second event is 38.2%.

William Charlton has specified that any AVCs which he might choose to take as a pension should be on a single life basis.

In the event of taking the tax-free cash sum, William Charlton has requested that the value of his AVCs should be taken as a cash sum first before commuting any of his XYZ pension.

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

William Charlton's current available Lump Sum Allowance ('LSA') is £268,275.00.