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)	${f x}$
-----------------	---------

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.