

CASE STUDY DETAILS**XYZ SCHEME****LEAVERS
[WITH SPECIAL
CIRCUMSTANCES]****Event history**

Date of first event **09/09/2024** First event **LEAVER**
Date of second event Second event

Member details

Surname **WILLIAMS** Forenames **BARNABY**
Date of birth **24/05/1963** Gender **MALE**
Spouse's date of birth **29/01/1967**
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 |
|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|
| 43,200 | 43,900 | 47,000 | 49,800 | 53,000 | 55,800 | 57,600 | 59,800 | 62,000 |

Contribution history

Total member's normal contributions **£**
Total member's AVCs **£**
Current value of AVCs **£**

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

Barnaby Williams' Final Pensionable Salary at 3 July 2011 was £41,000.00.

Lower of 5.0% or RPI increases from 4 July 2011 to date of first event is 48.7%.

On 15 June 2004, Barnaby Williams transferred in his benefits from the non-contributory registered pension scheme of a previous employer. The Scheme Actuary calculated that the transfer value would buy a fixed pension in the XYZ Pension and Life Assurance Scheme of £2,061.25 per annum, which would be payable from Barnaby Williams' Normal Pension Date. The transferred-in pension is subject to the normal rules of the XYZ Pension and Life Assurance Scheme.

Barnaby Williams' reason for leaving was resignation.