

CASE STUDY DETAILS**RST SCHEME****TRANSFERS****Event history**

Date of first event	05/09/2024	First event	TRANSFER IN
Date of second event		Second event	

Member details

Surname	ALONSO	Forenames	ISABEL
Date of birth	13/11/1979	Gender	FEMALE
Spouse's date of birth	14/08/1976		
Child dependant's date of birth			
Date of joining company	02/11/2015		
Date of joining scheme	06/04/2016		

Contribution history

Total member's normal contributions	£ 12,465.33
Total member's AVC	£ 7,514.95
Current value of AVCs	£ 8,826.21

Preserved benefits from previous scheme

Pension payable at age 65 (per annum) £ 12,119.37

Transfer value details from previous scheme

Member's total transfer value £ 78,248.16

Including:

- Member's total contributions £ 19,577.12
- Transfer value in respect of post 05/04/1997 benefits £ 62,433.66
- Member's post 05/04/1997 contributions £ 15,983.59
- Transfer value in respect of post 05/04/2006 benefits £
- Member's post 05/04/2006 contributions £

Special circumstances / additional information

Isabel Alonso is considering transferring in her benefits from the registered Defined Benefit arrangement of her previous employer.

Adjustment factor 1.01