**CASE STUDY DETAILS XYZ SCHEME QUESTION**

|  |  |  |  |
| --- | --- | --- | --- |
| **Event history**  Date of first event | **06/09/2020** | First event | **RETIREMENT** |
| Date of second event |  | Second event |  |
| **Member details**  Surname | **SIMMONS** | Forenames | **ARTHUR** |
| Date of birth | **13/03/1954** | Gender | **MALE** |

|  |  |
| --- | --- |
| Spouse’s date of birth | **11/08/1956** |
| Dependent child’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**

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **2012** | **2013** | **2014** | **2015** | **2016** | **2017** | **2018** | **2019** | **2020** |
| **47,850** | **49,500** | **50,250** | **52,000** | **55,700** | **56,200** | **61,000** | **63,050** | **63,150** |

**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) **£**

Post 05/04/1988

GMP (per annum) **£**

Contribution equivalent premium **£**

Certified amount **£**

# Special circumstances / additional information

Arthur Simmons’ Final Pensionable Salary at 3 July 2011 was £46,000.00

Lower of 5% / RPI increases from 4 July 2011 to Normal Pension Date is 21.2%.

Arthur Simmons worked 4 days a week throughout his employment with the Company.

Arthur Simmons’ current available Lifetime Allowance is 100.00%.