CASE STUDY DETAILS XYZ SCHEME TRANSFERS

QUESTION 4

**Event history**

Date of first event **04/12/2016** First event **PRESERVED LEAVER**

Date of second event **06/09/2020** Second event **TRANSFER OUT**

**Member details**

Surname **SMITH** Forenames **CALLUM**

Date of birth **24/06/1959** Gender **MALE**

Spouse's date of birth **30/10/1964**

Dependent child’s date of birth

Date of joining company **14/03/1984**

Date of joining scheme **14/04/1984**

Category of membership **A**

**Contribution history**

Total member's normal contributions **£ 18,545.38**

Post 05/04/1997 member’s normal contributions **£ 10,848.29**

Total member’s AVCs **£ 0.00**

Current value of AVCs **£ 0.00**

**Preserved benefits**

Member’s total pension at age 65 (per annum) **£ 19,248.28**

Including:

* Post 05/04/1997 pension at age 65 (per annum) **£ 10,968.56**
* Pre 06/04/1988 GMP at age 65 (per annum) **£ 1,034.80**
* Post 05/04/1988 GMP at age 65 (per annum) **£ 2,461.68**
* Total GMP at exit (per annum) **£ 1,689.48**

**Special circumstances / additional information**

Spouse’s pension on death after retirement (per annum) **£ 7,699.35**

Adjustment factor **1.01**

**TRANSFERS**

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