**cASE STUDY DETAILS XYZ SCHEME LEAVERS [WITH**

**SPECIAL**

# CIRCUMSTANCES]

**Event history**

Date of first event **04/09/2019** First event **LEAVER**

Date of second event Second event

**Member details**

Surname **MACGREGOR** Forenames **RICHARD**

Date of birth **07/07/1963** Gender **MALE**

Spouse’s date of birth **30/03/1964**

Dependent child’s date of birth

Date of joining company **01/06/1997**

Date of joining scheme **06/11/1997**

Category of membership **B**

**Pensionable salary history for the scheme year commencing 6 April**

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **2011** | **2012** | **2013** | **2014** | **2015** | **2016** | **2017** | **2018** | **2019** |
|  |  |  |  |  |  |  |  |  |
| **18,500** | **19,600** | **21,700** | **22,100** | **24,200** | **25,400** | **26,350** | **26,950** | **27,850** |
|  |  |  |  |  |  |  |  |  |

**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**

Mr MacGregor’s Final Pensionable Salary at 3 July 2011 was £18,500

Lower of 5% / RPI increases from 4 July 2011 to date of first event is 26.7%

Mr MacGregor’s reason for leaving was Voluntary.

On 6th July 2002, Mr MacGregor transferred in benefits from a previous employer.

The Scheme Actuary calculated that the amount transferred in bought a fixed pension of

**£3,460.00** p.a. payable from age 65 which had a 50% spouse’s pension attached.

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