**cASE STUDY DETAILS XYZ SCHEME DEATHS PART 1**

**Event history**

Date of first event **01/12/2020** First event **RETIREMENT**

Date of second event **09/09/2022** Second event **DEATH**

**Member details**

Surname **GREEN** Forenames **SARAH**

Date of birth **27/12/1961** Gender **FEMALE**

Spouse date of birth **25/02/1958**

Child dependant date of birth

Date of joining company **27/05/1985**

Date of joining scheme **27/06/1985**

Category of membership **A**

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

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **2014** | **2015** | **2016** | **2017** | **2018** | **2019** | **2020** | **2021** | **2022** |
|  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |

**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) **£**

**Special circumstances / additional information**

Pension in payment at date of second event is £12,381.25per annum, which is split as follows:

 Excess pension (per annum) **£ 10,607.01**

 Pre 6 April 1988 GMP (per annum) **£ 412.36**

 Post 5 April 1988 GMP (per annum) **£ 1,361.88**

Lower of 5.0% / RPI increases from date of first event to date of second event is 1.3%.

On retirement, Sarah Green commuted £4,126.14 per annum of pension in return for a tax-free cash sum of £62, 964.89.

Sarah Green’s current available Lifetime Allowance is 72.16%.

 **DEATHS 1**