CASE STUDY DETAILS XYZ SCHEME TRANSFERS

QUESTION 3

**Event history**

Date of first event **30/03/2018** First event **PRESERVED LEAVER**

Date of second event **03/09/2023** Second event **TRANSFER OUT**

**Member details**

Surname **PADGETT** Forenames **NICOLA**

Date of birth **17/04/1971** Gender **FEMALE**

Spouse's date of birth **03/05/1970**

Dependent child’s date of birth

Date of joining company **01/07/1996**

Date of joining scheme **01/08/1996**

Category of membership **A**

**Contribution history**

Total member's normal contributions **£ 21,432.73**

Post 05/04/1997 member’s normal contributions **£ 20,794.35**

Total member’s AVCs **£ 10,771.56**

Current value of AVCs **£ 14,864.47**

**Preserved benefits**

Member’s total pension at age 65 (per annum) **£14,032.60**

Including:

* Post 05/04/1997 pension at age 65 (per annum) **£13,216.82**
* Pre 06/04/1988 GMP at age 65 (per annum) **£ 0.00**
* Post 05/04/1988 GMP at age 65 (per annum) **£ 241.80**
* Total GMP at exit (per annum) **£ 130.52**

**Special circumstances / additional information**

Spouse’s pension on death after retirement (per annum) **£ 7,016.30**

Adjustment factor **1.01**

**TRANSFERS**

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