CASE STUDY DETAILS XYZ SCHEME TRANSFERS

QUESTION 4

**Event history**

Date of first event **13/03/2007** First event **PRESERVED LEAVER**

Date of second event **05/09/2023** Second event **TRANSFER OUT**

**Member details**

Surname **NOAKES**  Forenames **PAUL**

Date of birth **17/09/1963** Gender **MALE**

Spouse's date of birth **11/10/1965**

Dependent child’s date of birth

Date of joining company **17/06/1987**

Date of joining scheme **17/07/1987**

Category of membership **A**

**Contribution history**

Total member's normal contributions **£ 30,843.76**

Post 05/04/1997 member’s normal contributions **£ 17,566.73**

Total member’s AVCs **£ 0.00**

Current value of AVCs **£ 0.00**

**Preserved benefits**

Member’s total pension at age 65 (per annum) **£ 22,694.21**

Including:

* Post 05/04/1997 pension at age 65 (per annum) **£ 13,604.23**
* Pre 06/04/1988 GMP at age 65 (per annum) **£ 212.68**
* Post 05/04/1988 GMP at age 65 (per annum) **£ 2,217.80**
* Total GMP at exit (per annum) **£ 1,187.16**

**Special circumstances / additional information**

Spouse’s pension on death after retirement (per annum) **£ 11,347.11**

Adjustment factor **1.02**

**TRANSFERS**

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