

CASE STUDY DETAILS**XYZ SCHEME****DEATHS****Event history**

Date of first event **29/07/2022** First event **RETIREMENT**
Date of second event **14/09/2024** Second event **DEATH**

Member details

Surname **HOLDING** Forenames **SUZANNA**
Date of birth **19/03/1952** Gender **FEMALE**
Spouse's date of birth **20/01/1951**
Child dependant's date of birth
Date of joining company **06/11/1997**
Date of joining scheme **06/11/1997**
Category of membership **B**

Pensionable salary history for the scheme year commencing 6 April

| 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 | 2024 |
|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|
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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 £13,222.87 per annum.

Lower of 5.0% or RPI increases from date of first event to date of second event is 9.6%.

On retirement, Suzanna Holding commuted £3,185.60 per annum of pension in return for a tax-free cash sum of 54,664.90.

Suzanna Holding's current available Lump Sum & Death Benefit Allowance ('LS&DBA') is £972,685.10.