

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

Date of first event **09/12/2019** First event **PRESERVED LEAVER**

Date of second event **13/09/2024** Second event **RETIREMENT**

Member details

Surname **BALL** Forenames **JOSEPH**

Date of birth **13/09/1959** Gender **MALE**

Spouse's date of birth **12/07/1960**

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

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) £

Contribution equivalent premium £

Certified amount £

Special circumstances / additional information

Preserved pension (per annum) at date of first event £ **8,669.77**

Lower of 5.0% or RPI increases from date of first event to date of second event is 21.7%.

Joseph Ball's current available Lump Sum & Death Benefit Allowance ('LS&DBA') is £1,073,100.00.

Joseph Ball's current available Lump Sum Allowance ('LSA') is £268,275.00.