

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

Date of first event	04/09/2024	First event	TRANSFER IN
Date of second event		Second event	

Member details

Surname	BAUER	Forenames	ALBERT
Date of birth	25/07/1975	Gender	MALE
Spouse's date of birth	07/02/1977		
Child dependant's date of birth			
Date of joining company	01/02/2017		
Date of joining scheme	01/03/2017		
Category of membership	A		

Contribution history

Total member's normal contributions	£ 9,984.63
Total member's AVCs	£
Current value of AVCs	£

Preserved benefits from previous scheme

Pension payable at age 65 (per annum) £ 5,638.28

Including:

- Pre 06/04/1988 GMP at age 65 (per annum) £
- Post 05/04/1988 GMP at age 65 (per annum) £ 2,062.32
- GMP at exit (per annum) £ 615.68

Transfer value details from previous scheme

Member's total transfer value (including GMP liability) £ 29,239.74

Including:

- Member's total contributions £ 10,623.82
- Transfer value in respect of post 05/04/1997 benefits £ 13,875.83
- Member's post 05/04/1997 contributions £ 6,485.33

Special circumstances / additional information

Albert Bauer is considering transferring in his benefits from the registered Defined Benefit arrangement of his previous employer.

Adjustment factor 1.01