

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

Date of first event	02/04/2019	First event	PRESERVED LEAVER
Date of second event	03/09/2024	Second event	TRANSFER OUT

Member details

Surname	EKLUND	Forenames	KERSTEN
Date of birth	29/05/1972	Gender	FEMALE
Spouse's date of birth	14/02/1969		
Child dependant'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	£ 24,318.35
Post 05/04/1997 member's normal contributions	£ 23,009.05
Total member's AVCs	£ 11,710.50
Current value of AVCs	£ 15,644.44

Preserved benefits

Member's total pension at age 65 (per annum) **£ 15,032.60**

Including:

- Post 05/04/1997 pension at age 65 (per annum) **£ 14,106.82**
- Pre 06/04/1988 GMP at age 65 (per annum) **£**
- Post 05/04/1988 GMP at age 65 (per annum) **£ 254.28**
- Total GMP at exit (per annum) **£ 139.36**

Special circumstances / additional information

Spouse's pension on death after retirement (per annum) **£ 7,516.30**

Adjustment factor **1.01**

In accordance with the Occupational and Personal Pension Schemes (Conditions for Transfers) Regulations 2021, the Scheme Trustees have completed all of their necessary due diligence checks. They are satisfied that this is a legitimate transfer and that it can proceed.