XYZ SCHEME

DEATHS

Event history

Date of first event 26/12/2021 First event RETIREMENT

Date of second event 10/09/2025 Second event DEATH

Member details

Surname BEATON Forenames JAMES

Date of birth 26/12/1959 Gender MALE

Spouse's date of birth 21/02/1962

Child dependant's date of birth

Date of joining company 14/03/1989

Date of joining scheme 14/04/1989

Category of membership A

Pensionable salary history for the scheme year commencing 6 April

2017	2018	2019	2020	2021	2022	2023	2024	2025

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 £11,840.22 per annum, which is split as follows:

 Excess pension (per annum)
 \$\mathbf{x}\$
 8,930.30

 Pre 6 April 1988 GMP (per annum)
 \$\mathbf{x}\$

 Post 5 April 1988 GMP (per annum)
 \$\mathbf{x}\$
 2,909.92

Lower of 5.0% or RPI increases from date of first event to date of second event is 12.4%.

On retirement, James Beaton commuted £2,640.13 per annum of pension in return for a tax-free cash sum of £65, 000.00.

At the date of the second event, James Beaton was receiving a 50% joint-life, non-increasing augmented pension of £1,830.60 per annum. The augmented pension is not included in the figures stated above and should not be incorporated in the calculation of any lump sum death benefits.

James Beaton's current available Lump Sum & Death Benefit Allowance ('LS&DBA') is £1,002,688.98.