CASE STUDY DETAILS

XYZ SCHEME

RETIREMENTS

Event history

Date of first event 11/09/2025 First event RETIREMENT

Date of second event Second event

Member details

Surname WENIG Forenames ANTOINETTE

Date of birth 10/10/1965 Gender FEMALE

Spouse's date of birth 16/01/1963

Child dependant's date of birth

Date of joining company 23/09/1985

Date of joining scheme 23/10/1985

Category of membership A

Pensionable salary history for the scheme year commencing 6 April

2017	2018	2019	2020	2021	2022	2023	2024	2025
44,175	46,550	47,233	49,445	51,075	52,225	53,840	55,135	56,675

Contribution history

Total member's normal contributions £ 83,445.85

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) £ 1,062.36

Post 05/04/1988

GMP (per annum) £ 4,825.08

Contribution equivalent premium £

Certified amount £

Special circumstances / additional information

Antoinette Wenig paid the default contribution rate (70ths accrual) throughout her membership of the XYZ Pension & Life Assurance Scheme.

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

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