CASE STUDY DETAILS

XYZ SCHEME

RETIREMENTS

Event history

Date of first event 06/07/2011 First event PRESERVED LEAVER

Date of second event 12/09/2025 Second event RETIREMENT

Member details

Surname RAFFERTY Forenames PATRICK

Date of birth 12/09/1960 Gender MALE

Spouse's date of birth

Child dependant's date of birth

Date of joining company 10/02/1991

Date of joining scheme 10/03/1991

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 £ 33,656.42

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) £ 3,180.84

Contribution equivalent premium £

Certified amount £

Special circumstances / additional information

Preserved pension (per annum) at date of first event £ 7,046.71

Lower of 5.0% or RPI increases from date of first event to date of second event is 52.7%.

Patrick Rafferty's current available Lump Sum & Death Benefit Allowance ('LS&DBA') is £1,048,100.00.

Patrick Rafferty's current available Lump Sum Allowance ('LSA') is £243,275.00.