CASE STUDY DETAILS XYZ SCHEME

# **Event history**

Date of first event	16/09/2	025	First event	ILL HEALTH			
Date of second event			Second event				
Member details							
Member uetans							
Surname	KENNY		Forenames	NORMAN			
Date of birth	29/11/1	969	Gender	MALE			
Spouse's date of birth	20/03/1973						
Child dependant's date of birth							
Date of joining comp	06/11/1997						
Date of joining schem	06/11/1997						
Category of membership		В					

# Pensionable salary history for the scheme year commencing 6 April

2017	2018	2019	2020	2021	2022	2023	2024	2025
47,000	48,250	49,888	50,800	53,475	55,860	57,425	59,025	60,340

### **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)	£
Contribution equivalent premium	£
Certified amount	£

#### **Special circumstances / additional information**

Norman Kenny's Final Pensionable Salary at 3 July 2011 was £35,600.00.

Lower of 5.0% or RPI increases from 4 July 2011 to date of first event is 54.6%.

On 24 December 2005, the Company (with the consent of the Trustees) agreed that the percentage rate for Norman Kenny's spouse's pension would be augmented to 60% for all pensionable service from 1 January 2006 onwards.

Norman Kenny's current available Lump Sum & Death Benefit Allowance ('LS&DBA') is  $\pounds 1,073,100.00$ .

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