CASE STUDY DETAILS XYZ SCHEME

LEAVERS **WITH SPECIAL** CIRCUMSTANCES]

Event history

Date of first event	07/09/2025		First event	LEAVER		
Date of second event			Second event			
Member details						
Wiember uctails						
Surname	LEWIS		Forenames	DANIEL		
Date of birth	14/04/1964		Gender	MALE		
Spouse's date of birth	19/09/	1968				
Child dependant's date of birth						
Date of joining company		06/11/2	1997			
Date of joining schem	06/11/1997					
Category of membersl	В					

Pensionable salary history for the scheme year commencing 6 April

2017	2018	2019	2020	2021	2022	2023	2024	2025
47,200	49,000	50,200	53,800	55,000	57,800	59,600	64,800	66,000

Contribution history

Total member's normal contributions	£
Total member's AVCs	£
Current value of AVCs	£

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

Daniel Lewis' Final Pensionable Salary at 3 July 2011 was £35,000.00.

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

On 29 July 2005, Daniel Lewis transferred in his benefits from the non-contributory registered pension scheme of a previous employer. The Scheme Actuary calculated that the transfer value would buy a fixed pension in the XYZ Pension and Life Assurance Scheme of £1,740.52 per annum, which would be payable from Daniel Lewis' Normal Pension Date. The transferred-in pension is subject to the normal rules of the XYZ Pension and Life Assurance Scheme.

Daniel Lewis' reason for leaving was resignation.