

CASE STUDY DETAILS**XYZ SCHEME****TRANSFERS
QUESTION 1****Event history**

Date of first event	10/09/2025	First event	TRANSFER IN
Date of second event		Second event	

Member details

Surname	IVANOV	Forenames	DMITRY
Date of birth	02/02/1975	Gender	MALE
Spouse's date of birth	17/12/1976		
Child dependent's date of birth			
Date of joining company	01/05/2018		
Date of joining scheme	01/06/2018		
Category of membership	A		

Contribution history

Total member's normal contributions	£ 12,181.35
Total member's AVCs	£
Current value of AVCs	£

Preserved benefits from previous scheme

Pension payable at age 65 (per annum) **£ 4,008.85**

Including:

- Pre 06/04/1988 GMP at age 65 (per annum) **£**
- Post 05/04/1988 GMP at age 65 (per annum) **£ 975.00**
- GMP at exit (per annum) **£ 496.60**

Transfer value details from previous scheme

Member's total transfer value (including GMP liability) **£ 28,463.34**

Including:

- Member's total contributions **£ 12,574.76**
- Transfer value in respect of post 05/04/1997 benefits **£ 17,634.44**
- Member's post 05/04/1997 contributions **£ 7,563.55**

Special circumstances / additional information

Dmitry Ivanov is considering transferring in his benefits from the registered Defined Benefit arrangement of his previous employer.

Adjustment factor **0.99**