**cASE STUDY DETAILS XYZ SCHEME DEATHS**

**Event history**

Date of first event **10/09/2024** First event **DEATH**

Date of second event Second event

**Member details**

Surname **FREDERICKS** Forenames **LEROY**

Date of birth **10/11/1956** Gender **MALE**

Spouse’s date of birth **19/07/1959**

Child dependant’s date of birth

Date of joining company **26/05/1991**

Date of joining scheme **26/06/1991**

Category of membership **A**

**Pensionable salary history for the scheme year commencing 6 April**

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **2016** | **2017** | **2018** | **2019** | **2020** | **2021** | **2022** | **2023** | **2024** |
| **45,570** | **49,100** | **52,450** | **56,225** | **59,230** | **60,680** | **61,755** | **62,500** | **63,125** |

**Contribution history**

Total member’s normal contributions **£ 87,246.99**

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) **£ 3,092.44**

**Special circumstances / additional information**

Salary at date of first event **£ 64,125.00**

Leroy Fredericks paid the default contribution rate (70ths accrual) from the date he joined the XYZ Pension and Life Assurance Scheme until 5 April 2011.

From 6 April 2011 until 5 April 2018, Leroy Fredericks paid the lower contribution rate (80ths accrual).

From 6 April 2018 onwards, Leroy Fredericks paid the higher contribution rate (60ths accrual).

Leroy Fredericks’ current available Lump Sum & Death Benefit Allowance (‘LS&DBA’) is £1,048,550.00.