**cASE STUDY DETAILS XYZ SCHEME DEATHS**

**Event history**

Date of first event **29/07/2022** First event **RETIREMENT**

Date of second event **14/09/2024** Second event **DEATH**

**Member details**

Surname **HOLDING** Forenames **SUZANNA**

Date of birth **19/03/1952** Gender **FEMALE**

Spouse’s date of birth **20/01/1951**

Child dependant’s date of birth

Date of joining company **06/11/1997**

Date of joining scheme **06/11/1997**

Category of membership **B**

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

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **2016** | **2017** | **2018** | **2019** | **2020** | **2021** | **2022** | **2023** | **2024** |
|  |  |  |  |  |  |  |  |  |

**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) **£**

**Special circumstances / additional information**

Pension in payment at date of second event is £13,222.87 per annum.

Lower of 5.0% or RPI increases from date of first event to date of second event is 9.6%.

On retirement, Suzanna Holding commuted £3,185.60 per annum of pension in return for a tax-free cash sum of 54,664.90.

Suzanna Holding’s current available Lump Sum & Death Benefit Allowance (‘LS&DBA’) is £972,685.10.