**CASE STUDY DETAILS XYZ SCHEME RETIREMENTS**

**Event history**

Date of first event **12/09/2024** First event **ILL HEALTH**

Date of second event Second event

**Member details**

Surname **BANKS** Forenames **ALISON**

Date of birth **20/07/1968** Gender **FEMALE**

Spouse’s date of birth **14/02/1966**

Child dependant’s date of birth

Date of joining company **08/01/1992**

Date of joining scheme **08/02/1992**

Category of membership **A**

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

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **2016** | **2017** | **2018** | **2019** | **2020** | **2021** | **2022** | **2023** | **2024** |
| **37,000** | **39,400** | **41,600** | **44,100** | **47,250** | **49,150** | **51,700** | **54,625** | **56,200** |

**Contribution history**

Total member’s normal contributions **£ 59,220.60**

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) **£ 1,699.88**

Contribution equivalent premium **£**

Certified amount **£**

# Special circumstances / additional information

Alison Banks paid the default contribution rate (70ths accrual) throughout her period of membership of the XYZ Pension & Life Assurance Scheme.

Alison Banks’ current available Lump Sum & Death Benefit Allowance (‘LS&DBA’) is £1,073,100.00.

Alison Banks’ current available Lump Sum Allowance (‘LSA’) is £268,275.00.