**CASE STUDY DETAILS XYZ SCHEME RETIREMENTS**

**Event history**

Date of first event **12/09/2024** First event **RETIREMENT**

Date of second event Second event

**Member details**

Surname **HURST** Forenames **LORNA**

Date of birth **19/03/1966** Gender **FEMALE**

Spouse’s date of birth **21/07/1963**

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** |
| **54,100** | **57,400** | **58,355** | **60,720** | **61,867** | **64,250** | **67,125** | **69,700** | **68,000** |

**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) **£**

Contribution equivalent premium **£**

Certified amount **£**

# Special circumstances / additional information

Lorna Hurst’s Final Pensionable Salary at 3 July 2011 was £46,170.00

Lower of 5.0% or RPI increases from 4 July 2011 to date of first event is 48.7%.

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

Lorna Hurst’s current available Lump Sum Allowance (‘LSA’) is £268,275.00.