CASE STUDY DETAILS XYZ SCHEME TRANSFERS

**Event history**

Date of first event **04/09/2024** First event **TRANSFER IN**

Date of second event Second event

**Member details**

Surname **BAUER** Forenames **ALBERT**

Date of birth **25/07/1975** Gender **MALE**

Spouse's date of birth **07/02/1977**

Child dependant’s date of birth

Date of joining company **01/02/2017**

Date of joining scheme **01/03/2017**

Category of membership **A**

**Contribution history**

Total member's normal contributions **£ 9,984.63**

Total member’s AVCs **£**

Current value of AVCs **£**

**Preserved benefits from previous scheme**

Pension payable at age 65 (per annum) **£ 5,638.28**

Including:

* Pre 06/04/1988 GMP at age 65 (per annum) **£**
* Post 05/04/1988 GMP at age 65 (per annum) **£ 2,062.32**
* GMP at exit (per annum) **£ 615.68**

**Transfer value details from previous scheme**

Member’s total transfer value (including GMP liability) **£ 29,239.74**

Including:

* Member’s total contributions **£ 10,623.82**
* Transfer value in respect of post 05/04/1997 benefits **£ 13,875.83**
* Member’s post 05/04/1997 contributions **£ 6,485.33**

**Special circumstances / additional information**

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

Adjustment factor **1.01**