CASE STUDY DETAILS XYZ SCHEME TRANSFERS

**Event history**

Date of first event **06/09/2024** First event **TRANSFER IN**

Date of second event Second event

**Member details**

Surname **EASTMAN** Forenames **SARAH**

Date of birth **02/05/1965** Gender **FEMALE**

Spouse's date of birth **25/11/1962**

Child dependant’s date of birth

Date of joining company **01/09/2014**

Date of joining scheme **01/10/2014**

Category of membership **A**

**Contribution history**

Total member's normal contributions **£ 23,890.85**

Total member’s AVCs **£ 5,888.26**

Current value of AVCs **£ 11,615.35**

**Preserved benefits from previous scheme**

Pension payable at age 65 (per annum) **£ 3,922.95**

Including:

* Pre 06/04/1988 GMP at age 65 (per annum) **£ 106.08**
* Post 05/04/1988 GMP at age 65 (per annum) **£ 304.72**
* GMP at exit (per annum) **£ 282.88**

**Transfer value details from previous scheme**

Member’s total transfer value (including GMP liability) **£ 37,024.01**

Including:

* Member’s total contributions **£ 14,888.60**
* Transfer value in respect of post 05/04/1997 benefits **£ 29,100.02**
* Member’s post 05/04/1997 contributions **£ 11,495.33**

**Special circumstances / additional information**

Sarah Eastman is considering transferring in her benefits from the registered Defined Benefit arrangement of her previous employer.

Adjustment factor **1.02**