CASE STUDY DETAILS XYZ SCHEME TRANSFERS

**Event history**

Date of first event **13/03/2007** First event **PRESERVED LEAVER**

Date of second event **05/09/2024** Second event **TRANSFER OUT**

**Member details**

Surname **ROSCOW**  Forenames **KEITH**

Date of birth **25/10/1964** Gender **MALE**

Spouse's date of birth **01/11/1968**

Child dependant’s date of birth

Date of joining company **17/06/1987**

Date of joining scheme **17/07/1987**

Category of membership **A**

**Contribution history**

Total member's normal contributions **£ 34,883.62**

Post 05/04/1997 member’s normal contributions **£ 19,642.38**

Total member’s AVCs **£**

Current value of AVCs **£**

**Preserved benefits**

Member’s total pension at age 65 (per annum) **£ 23,900.11**

Including:

* Post 05/04/1997 pension at age 65 (per annum) **£ 14,014.39**
* Pre 06/04/1988 GMP at age 65 (per annum) **£ 185.12**
* Post 05/04/1988 GMP at age 65 (per annum) **£ 2,281.76**
* Total GMP at exit (per annum) **£ 1,116.44**

**Special circumstances / additional information**

Spouse’s pension on death after retirement (per annum) **£ 11,950.06**

Adjustment factor **1.02**

In accordance with the Occupational and Personal Pension Schemes (Conditions for Transfers) Regulations 2021, the Scheme Trustees have completed all of their necessary due diligence checks. They are satisfied that this is a legitimate transfer and that it can proceed.