CASE STUDY DETAILS RST SCHEME TRANSFERS

**Event history**

Date of first event **05/09/2024** First event **TRANSFER IN**

Date of second event Second event

**Member details**

Surname **ALONSO**  Forenames **ISABEL**

Date of birth **13/11/1979** Gender **FEMALE**

Spouse's date of birth **14/08/1976**

Child dependant’s date of birth

Date of joining company **02/11/2015**

Date of joining scheme **06/04/2016**

**Contribution history**

Total member's normal contributions **£ 12,465.33**

Total member’s AVC **£ 7,514.95**

Current value of AVCs **£ 8,826.21**

**Preserved benefits from previous scheme**

Pension payable at age 65 (per annum) **£ 12,119.37**

**Transfer value details from previous scheme**

Member’s total transfer value **£ 78,248.16**

Including:

* Member’s total contributions **£ 19,577.12**
* Transfer value in respect of post 05/04/1997 benefits **£ 62,433.66**
* Member’s post 05/04/1997 contributions **£ 15,983.59**
* Transfer value in respect of post 05/04/2006 benefits **£**
* Member’s post 05/04/2006 contributions **£**

**Special circumstances / additional information**

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

Adjustment factor **1.01**