

CASE STUDY DETAILS**XYZ SCHEME****DEATHS****Event history**

Date of first event **12/08/2025** First event **RETIREMENT**
Date of second event **17/09/2026** Second event **DEATH**

Member details

Surname **BEATTIE** Forenames **GERALDINE**
Date of birth **12/02/1954** Gender **FEMALE**
Spouse's date of birth **29/12/1954**
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

2018	2019	2020	2021	2022	2023	2024	2025	2026

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) £

Special circumstances / additional information

Pension in payment at date of second event is £11,993.40 per annum.

Lower of 5.0% or RPI increases from date of first event to date of second event is 3.7%.

On retirement, Geraldine Beattie commuted £1,531.86 per annum of pension in return for a tax-free cash sum of 25,000.00.

Geraldine Beattie's current available Lump Sum & Death Benefit Allowance ('LS&DBA') is £989,662.00.