

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

Date of first event	<b>11/09/2026</b>	First event	<b>TRANSFER IN</b>
Date of second event		Second event	

**Member details**

Surname	<b>REED</b>	Forenames	<b>JAMES</b>
Date of birth	<b>04/02/1976</b>	Gender	<b>MALE</b>
Spouse's date of birth	<b>18/07/1975</b>		
Child dependant's date of birth			
Date of joining company	<b>01/04/2019</b>		
Date of joining scheme	<b>01/05/2019</b>		
Category of membership	<b>A</b>		

**Contribution history**

Total member's normal contributions	<b>£ 13,811.92</b>
Total member's AVCs	<b>£</b>
Current value of AVCs	<b>£</b>

### **Preserved benefits from previous scheme**

Pension payable at age 65 (per annum)	<b>£</b>	<b>4,028.19</b>
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Including:

- |   |          |               |
|---|----------|---------------|
| • Pre 06/04/1988 GMP at age 65 (per annum)  | <b>£</b> |               |
| • Post 05/04/1988 GMP at age 65 (per annum) | <b>£</b> | <b>755.04</b> |
| • GMP at exit (per annum)                   | <b>£</b> | <b>339.04</b> |

### **Transfer value details from previous scheme**

Member's total transfer value (including GMP liability)	<b>£</b>	<b>33,174.56</b>
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Including:

- |   |          |                  |
|---|----------|------------------|
| • Member's total contributions                          | <b>£</b> | <b>11,703.55</b> |
| • Transfer value in respect of post 05/04/1997 benefits | <b>£</b> | <b>28,046.89</b> |
| • Member's post 05/04/1997 contributions                | <b>£</b> | <b>9,946.83</b>  |

### **Special circumstances / additional information**

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

Adjustment factor	<b>1.01</b>
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