CASE STUDY DETAILS XYZ SCHEME TRANSFERS

QUESTION 2

**Event history**

Date of first event **02/09/2020** First event **TRANSFER IN**

Date of second event Second event

**Member details**

Surname **AGUAYO** Forenames **LUCIA**

Date of birth **17/06/1964** Gender **FEMALE**

Spouse's date of birth **01/07/1965**

Child dependent’s date of birth

Date of joining company **01/07/2010**

Date of joining scheme **01/08/2010**

Category of membership **A**

**Contribution history**

Total member's normal contributions **£ 15,489.16**

Total member’s AVCs **£ 5,792.80**

Current value of AVCs **£ 8,654.32**

**Preserved benefits from previous scheme**

Pension payable at age 65 (per annum) **£ 7,853.47**

Including:

* Pre 06/04/1988 GMP at age 65 (per annum) **£ 110.24**
* Post 05/04/1988 GMP at age 65 (per annum) **£ 1,275.56**
* GMP at exit (per annum) **£ 515.84**

**Transfer value details from previous scheme**

Member’s total transfer value (including GMP liability) **£ 23,792.84**

Including:

* Member’s total contributions **£ 13,735.14**
* Transfer value in respect of post 05/04/1997 benefits **£ 9,864.12**
* Member’s post 05/04/1997 contributions **£ 7,523.68**

**Special circumstances / additional information**

Lucia Aguayo’s transfer of benefits from the registered Defined Benefit arrangement of her previous employer has now been received.

Adjustment factor **0.97**

**TRANSFERS**

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