

SCHEDULE 2

Article 2(2)

Amendment of legislation relating to occupational pension and personal pension schemes

Personal Pension Schemes (Disclosure of Information) Regulations

1.—(1) The Personal Pension Schemes (Disclosure of Information) Regulations (Northern Ireland) 1987⁽¹⁾ shall be amended in accordance with sub-paragraphs (2) to (4).

(2) In regulation 3(4)(a)(ii) (constitution of scheme), after “spouses” there shall be inserted “and civil partners”.

(3) In regulation 4(3)(a)(ii) (basic information about the scheme), after “spouses” there shall be inserted “and civil partners”.

(4) In Schedule 2 (information to be made available to individuals), in paragraph 2A⁽²⁾—

(a) in sub-paragraph (4)(b)—

(i) after “married” there shall be inserted “or in a civil partnership”, and

(ii) after “surviving spouse” there shall be inserted “or surviving civil partner”;

(b) in sub-paragraph (5)(a), after “not married” there shall be inserted “or in a civil partnership”.

Occupational Pension Schemes (Preservation of Benefit) Regulations

2. In regulation 19 of the Occupational Pension Schemes (Preservation of Benefit) Regulations (Northern Ireland) 1991⁽³⁾ (widows, widowers and dependants)—

(a) in the heading, after “widowers” there shall be inserted “, surviving civil partners”;

(b) after “if the person is married to,” there shall be inserted “in a civil partnership with,”;

(c) after “or (as the case may be)” there shall be inserted “in a civil partnership with, or”.

Occupational Pension Schemes (Revaluation) Regulations

3. In regulation 7(4) of the Occupational Pension Schemes (Revaluation) Regulations (Northern Ireland) 1991⁽⁴⁾ (commutation, forfeiture and surrender), for “widow or widower” there shall be substituted “widow, widower or surviving civil partner”.

Occupational Pension Schemes (Internal Dispute Resolution Procedures) Regulations

4. In regulation 2(1)(b) of the Occupational Pension Schemes (Internal Dispute Resolution Procedures) Regulations (Northern Ireland) 1996⁽⁵⁾ (meaning of “prescribed persons” and “complainant of a prescribed description”), after “widower” there shall be inserted “, surviving civil partner”.

Occupational Pension Schemes (Modification of Schemes) Regulations

5. In regulation 2 of the Occupational Pension Schemes (Modification of Schemes) Regulations (Northern Ireland) 1997⁽⁶⁾ (extension of meaning of “member”), for “widow or widower” (in each place where it occurs) there shall be substituted “widow, widower or surviving civil partner”.

(1) S.R. 1987 No. 288; relevant amending Regulations are S.R. 2002 No. 410

(2) Paragraph 2A was inserted by regulation 2(4) of S.R. 2002 No. 410

(3) S.R. 1991 No. 37

(4) S.R. 1991 No. 38; regulation 7(4) was amended by paragraph 27(9) of Schedule 2 to S.R. 1994 No. 300

(5) S.R. 1996 No. 203; to which there are amendments not relevant to this Order

(6) (S.R. 1997 No. 97

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Occupational Pension Schemes (Disclosure of Information) Regulations

6.—(1) The Occupational Pension Schemes (Disclosure of Information) Regulations (Northern Ireland) 1997(7) shall be amended in accordance with sub-paragraphs (2) to (6).

(2) In regulation 3(3)(b) (constitution of scheme), after “spouses” there shall be inserted “and civil partners”.

(3) In regulation 4(3)(b) (basic information about the scheme), after “spouse” there shall be inserted “or civil partner”.

(4) In regulation 6(6)(b) (availability and content of annual report), after “spouses” there shall be inserted “and civil partners”.

(5) In regulation 7(4)(b) (availability of actuarial valuation, schedule of contributions, payment schedule and statement of investment principles), after “spouses” there shall be inserted “and civil partners”.

(6) In Schedule 2 (information to be made available to individuals), in paragraph 6ZA(8)—

(a) in sub-paragraph (4)(b)—

(i) after “married” there shall be inserted “or in a civil partnership”,

(ii) after “surviving spouse” there shall be inserted “or, as the case may be, a surviving civil partner”;

(b) in sub-paragraph (5)(a), after “not married” there shall be inserted “or not in a civil partnership”.

Occupational Pension Schemes (Assignment, Forfeiture, Bankruptcy etc.) Regulations

7.—(1) The Occupational Pension Schemes (Assignment, Forfeiture, Bankruptcy etc.) Regulations (Northern Ireland) 1997(9) shall be amended in accordance with sub-paragraphs (2) and (3).

(2) In regulation 2 (commutation of a pension under an occupational pension scheme)—

(a) in paragraph (1)(b), for “his widow or her widower” there shall be substituted “the member’s widow, widower or surviving civil partner”;

(b) in paragraph (2), for “widow’s or widower’s” (in each place where it occurs) there shall be substituted “widow’s, widower’s or surviving civil partner’s”.

(3) In regulation 6(1)(a) (forfeiture of occupational pension), for “widow or widower” there shall be substituted “widow, widower or surviving civil partner”.

Stakeholder Pension Schemes Regulations

8. In regulation 18 of the Stakeholder Pension Schemes Regulations (Northern Ireland) 2000(10) (disclosure of information to members)—

(a) in paragraph (5E)(b)(11)—

(i) after “is married” there shall be inserted “or in a civil partnership”,

(ii) after “surviving spouse” there shall be inserted “or surviving civil partner”;

(b) in paragraph (5F)(a), after “not married” there shall be inserted “or not in a civil partnership”.

(7) (S.R. 1997 No. 98; relevant amending Regulations are S.R. 2002 No. 410

(8) (Paragraph 6ZA was inserted by regulation 3(4) of S.R. 2002 No. 410

(9) (S.R. 1997 No. 153; to which there are amendments not relevant to this Order

(10) (S.R. 2000 No. 262; relevant amending Regulations are S.R. 2002 No. 410

(11) (Paragraphs (5E) and (5F) were inserted by regulation 4(3)(b) of S.R. 2002 No. 410

Occupational and Personal Pension Schemes (Bankruptcy) Regulations

9. In regulation 7(2) of the Occupational and Personal Pension Schemes (Bankruptcy) Regulations (Northern Ireland) 2002(12) (calculation and verification of rights under pension arrangements)—

- (a) after “about pensions on divorce” there shall be inserted “and dissolution of a civil partnership”;
- (b) after “domestic and overseas divorce etc.” there shall be inserted “and dissolution of a civil partnership”.