
DRAFT STATUTORY INSTRUMENTS

2005 No.

The Pensions (Northern Ireland) Order 2005

PART VIII

STATE PENSIONS

Miscellaneous

Disclosure of state pension information

274.—(1) Section 38 of the 2000 Act (disclosure of state pension information) is amended as follows.

(2) In subsection (2), for the words from the beginning to “information”, substitute “The Department may, in the prescribed manner, disclose or authorise the disclosure of any information”.

(3) After subsection (3) insert—

“(3A) For the purposes of this section and of any regulations made under it, anything done by or in relation to a person who—

(a) provides, or proposes to provide, relevant services to a person falling within subsection (3) (“the qualifying person”), and

(b) is authorised in writing by the qualifying person to act for the purposes of this section,

is treated as done by or in relation to the qualifying person.

In paragraph (a) “relevant services” means services that may involve the giving of advice or forecasts to which information to which this section applies may be relevant.”.

(4) In subsection (7)—

(a) omit the word “and” at the end of paragraph (c), and

(b) after paragraph (d) add—

“and

(e) a projection of the amount of any lump sum to which that individual is likely to become entitled, or might become entitled in particular circumstances.”.

(5) In subsection (11)—

(a) for the definitions of “basic retirement pension” and “additional retirement pension”, substitute—

““additional retirement pension” means any additional pension or shared additional pension under the Contributions and Benefits Act, or any graduated retirement benefit under sections 35 and 36 of the National Insurance Act (Northern Ireland) 1966;

“basic retirement pension” means any basic pension under the Contributions and Benefits Act;”.

- (b) after the definition of “employer”, insert—
 - ““lump sum” means a lump sum under Schedule 5 or 5A to the Contributions and Benefits Act;”, and
- (c) for the definitions of “trustee” and “manager”, substitute—
 - ““trustee or manager”, in relation to an occupational or personal pension scheme, means—
 - (a) in the case of a scheme established under a trust, the trustee or trustees of the scheme, and
 - (b) in any other case, the person or persons responsible for the management of the scheme.”.