

---

STATUTORY INSTRUMENTS

---

**1991 No. 167**

**The Occupational Pension Schemes  
(Preservation of Benefit) Regulations 1991**

**Specific provisions to be included in scheme rules**

27.—(1) Except where paragraph (2) applies, a scheme is not to be treated as conforming with the preservation requirements unless it contains express rules to the effect (but not necessarily in the words) of the following provisions of [<sup>F1</sup>Chapter I of Part IV of the Act], to the extent that they apply to the scheme concerned, namely—

- (a) [<sup>F1</sup>section 71(1)] (members who must be entitled to short service benefit);
- (b) [<sup>F1</sup>section 71(3) and (4)] (age or time at which short service benefit must be made payable);
- (c) [<sup>F1</sup>section 74] (computation of benefit);
- (d) [<sup>F1</sup>section 75] (supplementary credits to be included in short service benefit); and
- (e) [<sup>F1</sup>section 76] (pension increases).

(2) A scheme that is constituted or amended by an interim trust deed or other interim instrument or agreement [<sup>F2</sup>shall be treated] as satisfying the preservation requirements if both the following conditions are satisfied, namely—

- (a) the instrument or agreement constituting or amending the scheme requires the trustees or managers of the scheme to operate it in accordance with the preservation requirements; and
- (b) [<sup>F3</sup>members and prospective members have been notified] of the general effect of the definitive provisions of the scheme that will give effect to the provisions of [<sup>F1</sup>Chapter I of Part IV of the Act] referred to in paragraph (1) above.

---

**Textual Amendments**

- F1** Words in reg. 27 substituted (12.5.1994) by [The Occupational and Personal Pension Schemes \(Consequential Amendments\) Regulations 1994 \(S.I. 1994/1062\)](#), reg. 1(2), **Sch. 2 para. 30(24)**
- F2** Words in reg. 27(2) substituted (6.4.97) by [S.I. 1996/2131](#), **reg. 2(17)(a)**
- F3** Words in reg. 27(2)(b) substituted (6.4.97) by [S.I. 1996/2131](#), **reg. 2(17)(b)**

**Changes to legislation:**

There are currently no known outstanding effects for the The Occupational Pension Schemes (Preservation of Benefit) Regulations 1991, Section 27.