

SCHEDULE 2

Article 2(2)

Amendments of subordinate legislation relating to occupational and personal pension schemes

Personal Pension Schemes (Disclosure of Information) Regulations 1987

1.—(1) Amend the Personal Pension Schemes (Disclosure of Information) Regulations 1987(1) as follows.

(2) In regulation 3 (constitution of scheme), in paragraph (4)(a)(ii), after “spouses” insert “and civil partners”.

(3) In regulation 4 (basic information about the scheme), in paragraph (3)(a)(ii), after “spouses” insert “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” insert “or in a civil partnership”;

(ii) after “spouse” insert “or civil partner”;

(b) in sub-paragraph (5)(a), after “not married” insert “or in a civil partnership”.

Occupational Pension Schemes (Preservation of Benefit) Regulations 1991

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

(a) in the heading preceding it, after “widowers” insert “, surviving civil partners”;

(b) after “if the person is married to,” insert “in a civil partnership with,”;

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

Occupational Pension Schemes (Revaluation) Regulations 1991

3. In regulation 8 of the Occupational Pension Schemes (Revaluation) Regulations 1991(4) (commutation, forfeiture and surrender), in paragraph (4), for “widow or widower” substitute “widow, widower or surviving civil partner”.

Occupational Pension Schemes (Internal Dispute Resolution Procedures) Regulations 1996

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

Occupational Pension Schemes (Disclosure of Information) Regulations 1996

5.—(1) Amend the Occupational Pension Schemes (Disclosure of Information) Regulations 1996(6) as follows.

(2) In regulation 3 (constitution of scheme), in paragraph (3)(b), after “spouses” insert “and civil partners”.

(1) [S.I. 1987/1110](#).

(2) Paragraph 2A was inserted by [S.I. 2002/1383](#).

(3) [S.I. 1991/167](#).

(4) [S.I. 1991/168](#); regulation 8 was amended by [S.I. 1994/1062](#).

(5) [S.I. 1996/1270](#).

(6) [S.I. 1996/1655](#).

Status: This is the original version (as it was originally made).

(3) In regulation 4 (basic information about the scheme), in paragraph (3)(b), after “spouse” insert “or civil partner”.

(4) In regulation 6 (availability and content of annual report), in paragraph (6)(b), after “spouses” insert “and civil partners”.

(5) In regulation 7 (availability of actuarial valuation, schedule of contributions, payment schedule and statement of investment principles), in paragraph (4)(b), after “spouses” insert “and civil partners”.

(6) In Schedule 2 (information to be made available to individuals), in paragraph 6ZA(7)—

(a) in sub-paragraph (4)(b)—

(i) after “married” insert “or in a civil partnership”;

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

(b) in sub-paragraph (5)(a), after “not married” insert “or not in a civil partnership”.

Occupational Pension Schemes (Modification of Schemes) Regulations 1996

6. In regulation 2 of the Occupational Pension Schemes (Modification of Schemes) Regulations 1996(8) (extension of the meaning of “member”), for “widow or widower” (in each place) substitute “widow, widower or surviving civil partner”.

Occupational Pension Schemes (Assignment, Forfeiture, Bankruptcy etc.) Regulations 1997

7.—(1) Amend the Occupational Pension Schemes (Assignment, Forfeiture, Bankruptcy etc.) Regulations 1997(9) as follows.

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

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

(b) in paragraph (2), for “widow’s or widower’s” (in each place) substitute “widow’s, widower’s or surviving civil partner’s”.

(3) In regulation 6 (forfeiture of occupational pension), in paragraph (1)(a), for “widow or widower” substitute “widow, widower or surviving civil partner”.

Stakeholder Pension Schemes Regulations 2000

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

(a) in paragraph (5E)(b)(11)—

(i) after “is married” insert “or in a civil partnership”;

(ii) after “surviving spouse” insert “or surviving civil partner”;

(b) in paragraph (5F)(a), after “not married” insert “or not in a civil partnership”.

(7) Paragraph 6ZA was inserted by [S.I. 2002/1383](#).

(8) [S.I. 1996/2517](#).

(9) [S.I. 1997/785](#).

(10) [S.I. 2000/1403](#).

(11) Paragraphs (5E) and (5F) were inserted by [S.I. 2002/1383](#).

Occupational and Personal Pension Schemes (Bankruptcy) (No. 2) Regulations 2002

9. In regulation 7 of the Occupational and Personal Pension Schemes (Bankruptcy) (No.2) Regulations 2002(12) (calculation and verification of rights under pension arrangements), in paragraph (2)—

- (a) after “and divorce” insert “and dissolution of a civil partnership”;
- (b) after “domestic and overseas divorce etc.” insert “and dissolution of a civil partnership”.