

[^{F1}Schedule 1

Regulation 9(6)(a)

Information for workers

Textual Amendments

- F1** Sch. 1 substituted (1.11.2013) by [The Automatic Enrolment \(Miscellaneous Amendments\) Regulations 2013 \(S.I. 2013/2556\)](#), regs. 1(1), **5(12)**

WHAT YOU NEED TO KNOW

Your employer cannot ask you or force you to opt out.

If you are asked or forced to opt out you can tell the Pensions Regulator – see www.thepensionsregulator.gov.uk

If you change your mind you may be able to opt back in – write to your employer if you want to do this.

If you stay opted out your employer will normally put you back into pension saving in around 3 years.

If you change job your new employer will normally put you back into pension saving straight away.

If you have another job your other employer might also put you into pension saving, now or in the future. This notice only opts you out of pension saving with the employer you name above. A separate notice must be filled out and given to any other employer you work for if you wish to opt out of that pension saving as well.]

[^{F2}SCHEDULE 2

Regulation 2,
^{F3}

... 21, 24 [^{F4}and 27]

Information

Textual Amendments

- F2** Sch. 2 inserted (1.7.2012) by [The Automatic Enrolment \(Miscellaneous Amendments\) Regulations 2012 \(S.I. 2012/215\)](#), regs. 1(2)(c), 43(3), **Sch.**
- F3** Word in Sch. 2 omitted (1.4.2015) by virtue of [The Occupational and Personal Pension Schemes \(Automatic Enrolment\) \(Amendment\) Regulations 2015 \(S.I. 2015/501\)](#), regs. 1, **15(a)**
- F4** Words in Sch. 2 substituted (1.4.2015) by [The Occupational and Personal Pension Schemes \(Automatic Enrolment\) \(Amendment\) Regulations 2015 \(S.I. 2015/501\)](#), regs. 1, **15(a)**

[^{F5}1. A statement that the jobholder has been, or will be, enrolled into a pension scheme.]

Textual Amendments

- F5** Sch. 2 para. 1 substituted (1.4.2015) by [The Occupational and Personal Pension Schemes \(Automatic Enrolment\) \(Amendment\) Regulations 2015 \(S.I. 2015/501\)](#), regs. 1, **15(c)**

2. The jobholder's automatic enrolment date, automatic re-enrolment date or enrolment date, as the case may be or, for a jobholder to whom regulation 28 or 29 applies, the day or date mentioned in regulation 6 as modified by regulation 28 or 29, as the case may be.

Changes to legislation: There are currently no known outstanding effects for the The Occupational and Personal Pension Schemes (Automatic Enrolment) Regulations 2010. (See end of Document for details)

^{F6}3.

Textual Amendments
F6 Sch. 2 para. 3 omitted (1.4.2015) by virtue of [The Occupational and Personal Pension Schemes \(Automatic Enrolment\) \(Amendment\) Regulations 2015 \(S.I. 2015/501\)](#), regs. 1, **15(b)**

4.—(1) The value of any contributions payable to the scheme by the employer and the jobholder in any applicable pay reference period.

(2) The information to be given to the jobholder under sub-paragraph (1) includes information on any change in the value of any contributions payable to the scheme by the employer or jobholder in any applicable pay reference period which will occur as the result of any changes to contributions brought about by the transitional periods for money purchase and personal pension schemes under section 29 of the Act (transitional periods for money purchase and personal pension schemes).

(3) The “value” of contributions may be expressed as a fixed amount or a percentage of any qualifying earnings or pensionable pay due to the jobholder in any applicable pay reference period.

5. A statement that any contributions payable to the scheme by the jobholder have been or will be deducted from any qualifying earnings or pensionable pay due to the jobholder.

6. Confirmation as to whether tax relief is or will be given [^{F7}on employee contributions.]

Textual Amendments
F7 Words in Sch. 2 para. 6 substituted (1.4.2015) by [The Occupational and Personal Pension Schemes \(Automatic Enrolment\) \(Amendment\) Regulations 2015 \(S.I. 2015/501\)](#), regs. 1, **15(d)**

^{F8}7.

Textual Amendments
F8 Sch. 2 para. 7 omitted (1.4.2015) by virtue of [The Occupational and Personal Pension Schemes \(Automatic Enrolment\) \(Amendment\) Regulations 2015 \(S.I. 2015/501\)](#), regs. 1, **15(b)**

8. A statement that the jobholder has the right to opt out of the scheme during the opt out period.

9. A statement indicating the start and end dates of the opt out period applicable to the jobholder if that information is known to the employer but if not, a statement that the opt out period is the period determined in accordance with regulation 9(2) or (3) of the Occupational and Personal Pension Schemes (Automatic Enrolment) Regulations 2010.

10. Where the opt out notice may be obtained.

11. A statement that opting out means that the jobholder will be treated for all purposes as not having become an active member of the scheme on that occasion.

12. A statement that after a valid opt out notice is given to the employer in accordance with regulation 9(2) or (3) any contributions paid by the jobholder will be refunded to the jobholder by the employer.

13. A statement that where the jobholder opts out the jobholder may opt in, in which case the employer will be required to arrange for that jobholder to become an active member of an automatic enrolment scheme once in any 12 month period.

Changes to legislation: There are currently no known outstanding effects for the The Occupational and Personal Pension Schemes (Automatic Enrolment) Regulations 2010. (See end of Document for details)

14. A statement that, after the opt out period, the jobholder may cease to make contributions in accordance with scheme rules.

15. A statement that a jobholder who opts out or who ceases active membership of the scheme will normally be automatically re-enrolled into an automatic enrolment scheme by the employer in accordance with regulations made under section 5 of the Act (automatic re-enrolment).

16. A statement that the jobholder may, by giving written notice to the employer, require the employer to make arrangements for the jobholder to become an active member of an automatic enrolment scheme and that the jobholder will be entitled to employer’s contributions.

17. A statement that the worker may, where they are working or ordinarily work in Great Britain and are aged at least 16 and under 75 and are not a member of a pension scheme that satisfies the requirements of section 9 of the Act, by giving written notice to the employer, require the employer to make arrangements for the worker to become an active member of such a pension scheme.

[^{F9}18. A statement that by giving written notice to the employer, the worker who is aged at least 16 and under 75 and—

- (a) who earns more than the lower qualifying earnings limit as specified in section 13(1)(a) of the Act (and the amount must be specified in the statement) and is not an active member of a qualifying scheme, may require the employer to arrange for that worker to become an active member of an automatic enrolment scheme and will be entitled to employer’s contributions; or
- (b) who earns no more than the lower qualifying earnings limit as specified in section 13(1) (a) of the Act (and the amount must be specified in the statement) and is not a member of a pension scheme that satisfies the requirements of section 9 of the Act, may require the employer to arrange for that worker to become an active member of such a pension scheme but will not be entitled to employer’s contributions.]

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Textual Amendments

F9 Sch. 2 para. 18 substituted (1.4.2015) by [The Occupational and Personal Pension Schemes \(Automatic Enrolment\) \(Amendment\) Regulations 2015 \(S.I. 2015/501\)](#), regs. 1, **15(e)**

^{F10}19.

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Textual Amendments

F10 Sch. 2 para. 19 omitted (1.4.2015) by virtue of [The Occupational and Personal Pension Schemes \(Automatic Enrolment\) \(Amendment\) Regulations 2015 \(S.I. 2015/501\)](#), regs. 1, **15(b)**

20. A statement that the employer has deferred automatic enrolment until the deferral date (and the date must be given).

21. A statement that the employer will automatically enrol the worker into an automatic enrolment scheme if, on the deferral date, the worker is aged 22 or more but less than state pension age, is working or ordinarily works in Great Britain, earnings of more than the amount specified in section 3(1)(c) of the Act (and the amount must be given) are payable to the worker and the worker is not already an active member of a qualifying scheme.

22. A statement that the employer intends to defer automatic enrolment in respect of that jobholder until the end of the transitional period for defined benefit and hybrid schemes.

^{F11}23.

Changes to legislation: There are currently no known outstanding effects for the The Occupational and Personal Pension Schemes (Automatic Enrolment) Regulations 2010. (See end of Document for details)

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Textual Amendments

F11 Sch. 2 para. 23 omitted (1.4.2015) by virtue of [The Occupational and Personal Pension Schemes \(Automatic Enrolment\) \(Amendment\) Regulations 2015 \(S.I. 2015/501\)](#), regs. 1, **15(b)**

24. A statement that a written notice from the worker must be signed by the worker or, if it is given by means of an electronic communication, must include a statement that the worker personally submitted the notice.]

^{F12}**25.**

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Textual Amendments

F12 Sch. 2 para. 25 omitted (1.4.2015) by virtue of [The Occupational and Personal Pension Schemes \(Automatic Enrolment\) \(Amendment\) Regulations 2015 \(S.I. 2015/501\)](#), regs. 1, **15(b)**

Changes to legislation:

There are currently no known outstanding effects for the The Occupational and Personal Pension Schemes (Automatic Enrolment) Regulations 2010.