

## SCHEDULES

### SCHEDULE 2

#### Basic information

### PART 2

Information to be given by occupational pension schemes not falling within paragraph 1 of Schedule 1 and schemes that are established under the Salvation Army Act 1963

**19.** The following information about benefits payable under the scheme (referred to in this paragraph as “benefits”)—

- (a) what the benefits are,
- (b) how benefits are calculated,
- (c) how the scheme defines pensionable earnings, if appropriate,
- (d) how and when benefits in payment are increased, if appropriate,
- (e) the rate at which rights to benefits accrue, if appropriate,
- (f) the conditions on which benefits are payable,
- (g) when benefits (including survivor’s benefits) are payable.

**20.** A statement that explains whether transfers can be made into the scheme, including whether such transfers can be made in accordance with Chapters 4 and 5 of Part 4 of the 1993 Act.

**21.** A summary of what can be done with a member’s accrued rights where the member leaves pensionable service before normal pension age, including whether the accrued rights can be transferred out of the scheme, converted into an annuity and commuted to a lump sum.

**22.** A statement relating to the matters mentioned in paragraph 21—

- (a) as to whether a charge may be made, and
- (b) that further information is available.

**23.**—(1) The scheme’s internal dispute resolution arrangements.

(2) The postal or electronic address and job title of the person who should be contacted to use those arrangements.

(3) This paragraph does not apply to a scheme within section 50(8) of the 1995 Act.

**24.** A statement that—

- (a) the Pensions Advisory Service is available at any time to assist members and beneficiaries with—
  - (i) pensions questions, and
  - (ii) issues they have been unable to resolve with the trustees or managers of the scheme,
- (b) the Pensions Ombudsman may investigate and determine certain complaints or disputes about pensions that are referred to the Ombudsman in accordance with the 1993 Act, and

**Status:** This is the original version (as it was originally made).

- (c) the Regulator may intervene in the running of schemes where trustees, managers, employers or professional advisers have failed in their duties.
- 25.** The postal address and electronic address at which each of the bodies referred to in paragraph 24 may be contacted.
- 26.** A statement setting out—
- (a) which benefits are funded and which benefits are not, and
  - (b) the manner in which any funded benefits are secured.
- 27.** A statement that most of the provisions of the 1995 Act do not apply to the scheme.
- 28.** Where the member has money purchase benefits, a statement that the value of the pension will depend on several factors including the amount of the contributions paid, the performance of investments and the cost of converting the benefit into an annuity.