

STATUTORY RULES OF NORTHERN IRELAND

**2014 No. 79**

**The Occupational and Personal Pension Schemes  
(Disclosure of Information) Regulations (Northern Ireland) 2014**

**PART 5**

Funding statements, benefit statements and illustrations

**Statements of benefits: non-money purchase benefits**

**16.**—(1) The information mentioned in paragraph (2) must be given in accordance with this regulation where—

- (a) the member has rights to benefits that are not money purchase benefits;
- (b) the member requests that [<sup>F1</sup>information;]
- (c) information has not been given to that member under this regulation in the 12 months before that [<sup>F2</sup>request, and]
- [<sup>F3</sup>(d) in relation to active members, a benefit information statement has not been provided pursuant to section 14(1) of the 2014 Act (information about benefits) in the 12 months before the request in sub-paragraph (b).]

(2) The information is—

- (a) for active members, the information listed in Parts 1 and 2 of Schedule 5;
- (b) for deferred members, the information listed in Parts 2 and 3 of that Schedule;
- (c) for pension credit members, the information listed in Part 4 of that Schedule.

(3) The information must be given as soon as practicable and in any event no more than 2 months after the date the request is made.

(4) In this regulation “pension credit member” means a person who has rights under the scheme that are attributable (directly or indirectly) to a credit under Article 26(1)(b) of the 1999 Order (creation of pension debits and credits) or under section 29(1)(b) of the Welfare Reform and Pensions Act 1999(1).

**Textual Amendments**

- F1** Words in [reg. 16\(1\)\(b\)](#) substituted (6.4.2015) by [The Occupational and Personal Pension Schemes \(Disclosure of Information\) \(Amendment\) Regulations \(Northern Ireland\) 2015 \(S.R. 2015/154\)](#), [regs. 1\(1\), 5\(a\)](#)
- F2** Words in [reg. 16\(1\)\(c\)](#) substituted (6.4.2015) by [The Occupational and Personal Pension Schemes \(Disclosure of Information\) \(Amendment\) Regulations \(Northern Ireland\) 2015 \(S.R. 2015/154\)](#), [regs. 1\(1\), 5\(b\)](#)

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**Changes to legislation:** *There are currently no known outstanding effects for the The Occupational and Personal Pension Schemes (Disclosure of Information) Regulations (Northern Ireland) 2014, Section 16. (See end of Document for details)*

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**F3** Reg. 16(1)(d) added (6.4.2015) by The Occupational and Personal Pension Schemes (Disclosure of Information) (Amendment) Regulations (Northern Ireland) 2015 (S.R. 2015/154), regs. 1(1), **5(c)**

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**Commencement Information**

**I1** Reg. 16 in operation at 6.4.2014, see **reg. 1(1)**

**Changes to legislation:**

There are currently no known outstanding effects for the The Occupational and Personal Pension Schemes (Disclosure of Information) Regulations (Northern Ireland) 2014, Section 16.