

SCHEDULES

SCHEDULE 12

CONSEQUENTIAL AMENDMENTS

PART I

AMENDMENTS CONSEQUENTIAL ON PARTS III AND IV

[^{F1}Senior Courts Act 1981] (c.54)

Textual Amendments

F1 Words in Blanket Amendment substituted (1.10.2009) by Constitutional Reform Act 2005 (c. 4), s. 148(1), Sch. 11 para. 1(2); S.I. 2009/1604, art. 2(d)

- 1
- In paragraph 3 of Schedule 1 to the [^{F1}Senior Courts Act 1981], after paragraph (f) there is inserted—

“(fa) all proceedings relating to a debit or credit under section 29(1) or 49(1) of the Welfare Reform and Pensions Act 1999;”.
- Matrimonial and Family Proceedings Act 1984 (c.42)
- 2
- The Matrimonial and Family Proceedings Act 1984 is amended as follows.
- 3
- In section 17, for subsection (1) there is substituted—

“(1) Subject to section 20 below, on an application by a party to a marriage for an order for financial relief under this section, the court may—

(a) make any one or more of the orders which it could make under Part II of the 1973 Act if a decree of divorce, a decree of nullity of marriage or a decree of judicial separation in respect of the marriage had been granted in England and Wales, that is to say—

(i) any order mentioned in section 23(1) of the 1973 Act (financial provision orders); and

(ii) any order mentioned in section 24(1) of that Act (property adjustment orders); and

(b) if the marriage has been dissolved or annulled, make one or more orders each of which would, within the meaning of that Part of that Act, be a pension sharing order in relation to the marriage.”
- 4
- In section 21—

(a) the word “made”, in both places, is omitted,

(b) after paragraph (b) there is inserted—

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- “(ba) section 24B(3) to (5) (provisions about pension sharing orders in relation to divorce and nullity);
- (bb) section 24C (duty to stay pension sharing orders);
- (bc) section 24D (apportionment of pension sharing charges);”,
- and
- (c) at the end there is inserted—
 - “(l) section 40A (appeals relating to pension sharing orders which have taken effect).”

Family Law (Scotland) Act 1985 (c.37)

5 The Family Law (Scotland) Act 1985 has effect subject to the following amendments.

6 In section 8, after subsection (3) there is inserted—

- “(4) The court shall not, in the same proceedings, make both a pension sharing order and an order under section 12A(2) or (3) of this Act in relation to the same pension arrangement.
- (5) Where, as regards a pension arrangement, the parties to a marriage have in effect a qualifying agreement which contains a term relating to pension sharing, the court shall not—
 - (a) make an order under section 12A(2) or (3) of this Act; or
 - (b) make a pension sharing order,
 relating to the arrangement unless it also sets aside the agreement or term under section 16(1)(b) of this Act.
- (6) The court shall not make a pension sharing order in relation to the rights of a person under a pension arrangement if there is in force an order under section 12A(2) or (3) of this Act which relates to benefits or future benefits to which he is entitled under the pension arrangement.
- (7) In subsection (5) above—
 - (a) “term relating to pension sharing” shall be construed in accordance with section 16(2A) of this Act; and
 - (b) “qualifying agreement” has the same meaning as in section 28(3) of the Welfare Reform and Pensions Act 1999.”

7 After section 8 there is inserted—

“8A Pension sharing orders: apportionment of charges.

If a pension sharing order relates to rights under a pension arrangement, the court may include in the order provision about the apportionment between the parties of any charge under section 41 of the Welfare Reform and Pensions Act 1999 (charges in respect of pension sharing costs) or under corresponding Northern Ireland legislation.”

8 (1) Section 10 is amended as follows.

(2) In subsection (5)(b), for “scheme” there is substituted “ arrangement ”.

(3) For subsection (8) there is substituted—

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“(8) The Secretary of State may by regulations make provision about calculation and verification in relation to the valuation for the purposes of this Act of benefits under a pension arrangement or relevant state scheme rights.”

(4) After that subsection there is inserted—

“(8A) Regulations under subsection (8) above may include—

- (a) provision for calculation or verification in accordance with guidance from time to time prepared by a prescribed person; and
- (b) provision by reference to regulations under section 30 or 49(4) of the Welfare Reform and Pensions Act 1999.”

(5) In subsection (9), after “subsection (8) above” there is inserted “ may make different provision for different purposes and ”.

(6) Subsections (10) and (11) cease to have effect.

Commencement Information

II Sch. 12 para. 8 wholly in force at 15.4.2000; Sch. 12 para. 8 not in force at Royal Assent see s. 89(1); Sch. 12 para. 8(1)(2)(5)(6) in force at 1.12.2000 by S.I. 2000/1047, art. 2(2)(d), Sch. Pt. IV; Sch. 12 para. 8(3)(4) in force at 15.4.2000 by S.S.I. 2000/111, art. 2

- 9 (1) Section 12A is amended as follows.
- (2) In subsection (1)(a), for “scheme” there is substituted “ arrangement ”.
- (3) In subsection (2), for “trustees or managers of the pension scheme” there is substituted “ person responsible for the pension arrangement ”.
- (4) In subsection (3), in paragraphs (a) and (c) for “trustees or managers of the pension scheme” there is substituted “ person responsible for the pension arrangement ” and in paragraph (a) for “have” there is substituted “ has ”.
- (5) In subsection (4)—
- (a) for “trustees or managers” there is substituted “ person responsible for the pension arrangement ”, and
 - (b) for “trustees’ or managers’ liability” there is substituted “ liability of the person responsible for the pension arrangement ”.
- (6) In subsection (5), for “trustees or managers” there is substituted “ person responsible for the pension arrangement ”.
- (7) In subsection (6)—
- (a) for “trustees or managers of”, wherever occurring, there is substituted “ person responsible for ”,
 - (b) for “scheme”, wherever occurring, there is substituted “ arrangement ”, and
 - (c) in paragraph (b), for “have” there is substituted “ has ”.
- (8) In subsection (7)—
- (a) for “trustees or managers” where first occurring there is substituted “ person responsible for the pension arrangement ”,
 - (b) for “trustees or managers of” there is substituted “ person responsible for ”, and

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(c) for “scheme” there is substituted “ arrangement ”.

(9) For subsection (10) there is substituted—

“(10) The definition of “benefits under a pension scheme” in section 27 of this Act does not apply to this section.”

10 In section 13(2)(b), after “property” there is inserted “ , or a pension sharing order, ”.

11 (1) Section 16 is amended as follows.

(2) In subsection (2), for paragraph (b) there is substituted—

“(b) under subsection (1)(b) above, if the agreement does not contain a term relating to pension sharing, on granting decree of divorce or within such time as the court may specify on granting decree of divorce; or

(c) under subsection (1)(b) above, if the agreement contains a term relating to pension sharing—

(i) where the order sets aside the agreement or sets aside or varies the term relating to pension sharing, on granting decree of divorce; and

(ii) where the order sets aside or varies any other term of the agreement, on granting decree of divorce or within such time thereafter as the court may specify on granting decree of divorce.”

(3) After that subsection there is inserted—

“(2A) In subsection (2) above, a term relating to pension sharing is a term corresponding to provision which may be made in a pension sharing order and satisfying the requirements set out in section 28(1)(f) or 48(1)(f) of the Welfare Reform and Pensions Act 1999.”

12 In section 27(1), the following definitions are inserted at the appropriate places—

““benefits under a pension arrangement” includes any benefits by way of pension, including relevant state scheme rights, whether under a pension arrangement or not;”

““pension arrangement” means—

(a) any occupational pension scheme within the meaning of the ^{M1}Pension Schemes Act 1993;

(b) a personal pension scheme within the meaning of that Act;

(c) a retirement annuity contract;

(d) an annuity or insurance policy purchased or transferred for the purpose of giving effect to rights under an occupational pension scheme or a personal pension scheme;

(e) an annuity purchased or entered into for the purpose of discharging liability in respect of a pension credit under section 29(1)(b) of the Welfare Reform and Pensions Act 1999 or under corresponding Northern Ireland legislation;”

““person responsible for a pension arrangement” means—

(a) in the case of an occupational pension scheme or a personal pension scheme, the trustees or managers of the scheme;

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- (b) in the case of a retirement annuity contract or an annuity falling within paragraph (d) or (e) of the definition of “pension arrangement” above, the provider of the annuity;
- (c) in the case of an insurance policy falling within paragraph (d) of the definition of that expression, the insurer;”

““relevant state scheme rights” means—

- (a) entitlement, or prospective entitlement, to a Category A retirement pension by virtue of section 44(3)(b) of the ^{M2}Social Security Contributions and Benefits Act 1992 or under corresponding Northern Ireland legislation; and
- (b) entitlement, or prospective entitlement, to a pension under section 55A of the ^{M3}Social Security Contributions and Benefits Act 1992 (shared additional pension) or under corresponding Northern Ireland legislation;”

““retirement annuity contract” means a contract or scheme approved under Chapter III of Part XIV of the ^{M4}Income and Corporation Taxes Act 1988;”

““trustees or managers” in relation to an occupational pension scheme or a personal pension scheme means—

- (a) in the case of a scheme established under a trust, the trustees of the scheme; and
- (b) in any other case, the managers of the scheme;”.

Marginal Citations

- M1 1993 c. 48.
- M2 1992 c. 4.
- M3 1992 c. 4.
- M4 1988 c. 1.

Income and Corporation Taxes Act 1988 (c.1)

F213

Textual Amendments

- F2 Sch. 12 para. 13 repealed (6.4.2006) by Finance Act 2004 (c. 12), Sch. 42 Pt. 3 (with Sch. 36)

Social Security Contributions and Benefits Act 1992 (c.4)

- 14 The Contributions and Benefits Act has effect subject to the following amendments.
- 15 (1) Section 20 is amended as follows.
- (2) In subsection (1), after paragraph (f) there is inserted—
“(fa) shared additional pensions;”.
- (3) In subsection (2), in the definition of “long-term benefit”, after paragraph (d) there is inserted—

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“(e) a shared additional pension;”.

16 In section 21(1), after “41 below” there is inserted “ or a shared additional pension under section 55A below ”.

17 In section 39(1), (2) and (3), for “45A” there is substituted “ 45B ”.

18 In section 43, at the end there is inserted—

“(6) For the purposes of this section, a pension under section 55A below is not a retirement pension.”

19 In section 48A(4), for “45A” there is substituted “ 45B ”.

20 In section 48B(2) and (3), for “45A” there is substituted “ 45B ”.

21 In section 48C(4), for “45A” there is substituted “ 45B ”.

22 In section 54(1), at the end there is inserted “ or to a shared additional pension ”.

Social Security Administration Act 1992 (c.5)

23 The Administration Act is amended as follows.

24 In section 150(1)—

(a) after paragraph (c) there is inserted—

“(ca) which are shared additional pensions;”, and

(b) after paragraph (d) there is inserted—

“(da) which are the increases in the rates of shared additional pensions under section 55C of that Act;”.

25 (1) Section 155A is amended as follows.

(2) In subsection (1)(a)(i), after “retirement pension” there is inserted “ or shared additional pension ”.

(3) In subsection (2), after “retirement pension” there is inserted “ , a shared additional pension ”.

26 In section 163(2)—

(a) after paragraph (a) there is inserted—

“(aa) any administrative expenses of the Secretary of State in supplying information about benefits under Part II of that Act in accordance with regulations under section 23 of the Welfare Reform and Pensions Act 1999;”, and

(b) in paragraph (b), for “that Act” there is substituted “ the Contributions and Benefits Act ”.

27 In section 165(5)(b), after “section 163(2)(a)” there is inserted “ or (aa) ”.

Pension Schemes Act 1993 (c.48)

28 The Pension Schemes Act 1993 has effect subject to the following amendments.

^{F3}29

Textual Amendments

F3 Sch. 12 para. 29 repealed (6.4.2009) by Pensions Act 2008 (c. 30), s. 149(1), Sch. 11 Pt. 2; S.I. 2009/82, art. 2(2)(g)

F430

Textual Amendments

F4 Sch. 12 para. 30 repealed (6.4.2009) by Pensions Act 2008 (c. 30), s. 149(1), Sch. 11 Pt. 2; S.I. 2009/82, art. 2(2)(g)

- 31
- (1) Section 83 is amended as follows.

(2) In subsection (1), before “benefits”, in both places, there is inserted “ relevant ”.

(3) After that subsection there is inserted—

“(1A) The following are relevant benefits for the purposes of subsection (1)—

(a) any benefits payable otherwise than by virtue of rights which are attributable (directly or indirectly) to a pension credit, and

(b) in the case of a salary related occupational pension scheme, any benefits payable by virtue of such rights, to the extent that the rights involve the member being credited by the scheme with notional pensionable service.”

(4) At the end there is inserted—

“(4) For the purposes of this section, an occupational pension scheme is salary related if—

(a) it is not a money purchase scheme, and

(b) it does not fall within a prescribed class.”
- 32
- In section 85, after “73(2)(b)” there is inserted “ or 101D(2)(b) ”.
- 33
- In section 93, after subsection (1) there is inserted—

“(1ZA) In subsection (1), references to accrued rights to benefit do not include rights which are attributable (directly or indirectly) to a pension credit.”
- 34
- In section 93A, after subsection (1) there is inserted—

“(1A) In subsection (1), the reference to benefits which have accrued does not include benefits which are attributable (directly or indirectly) to a pension credit.”
- 35
- In section 94, after subsection (1A) there is inserted—

“(1B) In subsection (1), references to benefits which have accrued do not include benefits which are attributable (directly or indirectly) to a pension credit.”
- 36
- In section 96, there is inserted at the end—

“(4) Where a member of an occupational pension scheme or a personal pension scheme—

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- (a) is entitled to give a notice under section 101F(1) to the trustees or managers of the scheme, or
- (b) would be entitled to do so, but for section 101G(1),
- he may not, if the scheme so provides, make an application to them under section 95 unless he also gives them a notice under section 101F(1).”
- 37 (1) Section 98 is amended as follows.
- (2) In subsection (5)—
- (a) after “part of the” there is inserted “ relevant ”, and
- (b) for “any of the benefits mentioned in that section” there is substituted “ benefits ”.
- (3) In subsection (8), after “this section” there is inserted—
- ““relevant benefits” means any benefits not attributable (directly or indirectly) to a pension credit; and”.
- 38 (1) Section 100 is amended as follows.
- (2) In subsection (1), for “subsection (2)” there is substituted “ subsections (2) and (2A) ”.
- (3) After subsection (2) there is inserted—
- “(2A) If the making of the application depended on the giving of a notice under section 101F(1), the application may only be withdrawn if the notice is also withdrawn.”
- 39 (1) Section 129 is amended as follows.
- (2) In subsection (1), after “Part IV,” there is inserted “ Chapters I and II of Part IVA, ”.
- ^{F5}(3)

Textual Amendments

F5 Sch. 12 para. 39(3) repealed (6.4.2006) by Pensions Act 2004 (c. 35), s. 322(1), Sch. 13; S.I. 2006/560, art. 2(3), Sch. Pt. 3

- 40 (1) Section 178 is amended as follows.
- (2) In paragraph (a)—
- (a) the words “or of” are omitted, and
- (b) at the end there is inserted “ , section 25D of the ^{M5}Matrimonial Causes Act 1973, section 12A of the ^{M6}Family Law (Scotland) Act 1985 or Part III or IV of the Welfare Reform and Pensions Act 1999. ”
- (3) In paragraph (b), after “Part IV,” there is inserted “ Chapter I of Part IVA, ”.

Marginal Citations

M5 1973 c. 18.

M6 1985 c. 37.

Changes to legislation: There are currently no known outstanding effects for the Welfare Reform and Pensions Act 1999, Part I. (See end of Document for details)

41 In section 181(1)—

(a) after the definition of “occupational pension scheme” there is inserted—

““pension credit” means a credit under section 29(1)(b) of the Welfare Reform and Pensions Act 1999 or under corresponding Northern Ireland legislation;”, and

^{F6}(b)

Textual Amendments

F6 Sch. 12 para. 41(b) repealed (6.4.2009) by Pensions Act 2008 (c. 30), s. 149(1), Sch. 11 Pt. 2; S.I. 2009/82, art. 2(2)(g)

42 In section 183(3), for “and 97(1)” there is substituted “, 97(1) and 101I”.

Pensions Act 1995 (c.26)

43 The Pensions Act 1995 has effect subject to the following amendments.

^{F7}44

Textual Amendments

F7 Sch. 12 para. 44 repealed (6.4.2006) by Pensions Act 2004 (c. 35), s. 322(1), Sch. 13; S.I. 2005/3331, art. 2(6), Sch. Pt. 6

^{F8}45

Textual Amendments

F8 Sch. 12 paras. 45-49 repealed (6.4.2006) by Pensions Act 2004 (c. 35), s. 322(1), Sch. 13; S.I. 2005/3331, art. 2(6), Sch. Pt. 6

^{F8}46

Textual Amendments

F8 Sch. 12 paras. 45-49 repealed (6.4.2006) by Pensions Act 2004 (c. 35), s. 322(1), Sch. 13; S.I. 2005/3331, art. 2(6), Sch. Pt. 6

^{F8}47

Textual Amendments

F8 Sch. 12 paras. 45-49 repealed (6.4.2006) by Pensions Act 2004 (c. 35), s. 322(1), Sch. 13; S.I. 2005/3331, art. 2(6), Sch. Pt. 6

^{F8}48

Changes to legislation: There are currently no known outstanding effects for the Welfare Reform and Pensions Act 1999, Part I. (See end of Document for details)

Textual Amendments
F8 Sch. 12 paras. 45–49 repealed (6.4.2006) by Pensions Act 2004 (c. 35), s. 322(1), Sch. 13; S.I. 2005/3331, art. 2(6), Sch. Pt. 6

^{F8}49

Textual Amendments
F8 Sch. 12 paras. 45–49 repealed (6.4.2006) by Pensions Act 2004 (c. 35), s. 322(1), Sch. 13; S.I. 2005/3331, art. 2(6), Sch. Pt. 6

- 50 (1) Section 38 is amended as follows.
- (2) In subsection (1), for the words from “that the scheme” to the end there is substituted—
- “(a) that the scheme is not for the time being to be wound up but that no new members are to be admitted to it, or
 - (b) that the scheme is not for the time being to be wound up but that no new members, except pension credit members, are to be admitted to it.”
- (3) In subsection (2), the words from “but” to the end are omitted.
- (4) After that subsection there is inserted—
- “(2A) Subsection (2) does not authorise the trustees to determine—
- (a) where there are accrued rights or pension credit rights to any benefit, that the benefit is not to be increased, or
 - (b) where the power conferred by that subsection is exercisable by virtue of a determination under subsection (1)(b), that members of the scheme may not acquire pension credit rights under it.”
- 51 In section 51(6), after “a pension” there is inserted “ which is attributable (directly or indirectly) to a pension credit or ”.
- 52 In section 53, after subsection (3) there is inserted—
- “(3A) In subsections (1) and (2), the references to a person’s pension do not include any pension which is attributable (directly or indirectly) to a pension credit.”

^{F9}53

Textual Amendments
F9 Sch. 12 para. 53 repealed (6.4.2006) by Pensions Act 2004 (c. 35), s. 322(1), Sch. 13; S.I. 2005/3331, art. 2(6), Sch. Pt. 6

- 54 In section 68(2), for “and” at the end of paragraph (d) there is substituted—
- “(da) to enable the scheme to accommodate persons with pension credits or pension credit rights, and”.

^{F10}55

Changes to legislation: There are currently no known outstanding effects for the Welfare Reform and Pensions Act 1999, Part I. (See end of Document for details)

Textual Amendments

F10 Sch. 12 para. 55 repealed (6.4.2005) by [Pensions Act 2004 \(c. 35\)](#), s. 322(1), [Sch. 13](#); S.I. 2005/695, art. 2(7), [Sch. 1](#)

- 56 In section 74(3)(b), at the end there is inserted “ or pension credit rights ”.
- 57 (1) Section 91 is amended as follows.
- (2) In subsection (1), for the words from “, or has” to “occupational pension scheme” there is substituted “ to a pension under an occupational pension scheme or has a right to a future pension under such a scheme ”.
- (3) In subsection (2), for the words from “, or” to “scheme” there is substituted “ to a pension under an occupational pension scheme, or right to a future pension under such a scheme, ”.
- (4) In subsection (5)—
- (a) for the words from “, or has” to “scheme” there is substituted “ to a pension under an occupational pension scheme, or has a right to a future pension under such a scheme ”,
- (b) in paragraph (d), for “accrued right, to pension” there is substituted “ right, ”, and
- (c) in paragraph (e), for “accrued right, to pension” there is substituted “ right ”.
- 58 (1) Section 92 is amended as follows.
- (2) In subsection (1), for the words from “, or” to “scheme” there is substituted “ to a pension under an occupational pension scheme or a right to a future pension under such a scheme ”.
- (3) In subsection (4), for the words from “person entitled” to “accrued” there is substituted “ pensioner, or prospective pensioner ”.
- 59 (1) Section 93 is amended as follows.
- (2) In subsection (1), for the words from “, or” to “scheme” there is substituted “ to a pension under an occupational pension scheme or right to a future pension under such a scheme ”.
- (3) In subsection (2)—
- (a) for “accrued right to a pension” there is substituted “ right ”, and
- (b) for “accrued right to a pension under the scheme” there is substituted “ right ”.
- (4) In subsection (4), for “accrued right to a pension” there is substituted “ right ”.

^{F11}60

Textual Amendments

F11 Sch. 12 para. 60 repealed (6.4.2005) by [Pensions Act 2004 \(c. 35\)](#), s. 322(1), [Sch. 13](#); S.I. 2005/1108, art. 2(2), [Sch.](#)

- 61 (1) Section 124 is amended as follows.

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- (2)

In subsection (1), in the definition of “member”, for “or pensioner” there is substituted “, pensioner or pension credit”.
- (3)

In that subsection, after the definition of “payment schedule” there is inserted—

““pension credit” means a credit under section 29(1)(b) of the Welfare Reform and Pensions Act 1999, or under corresponding Northern Ireland legislation,

“pension credit member”, in relation to an occupational pension scheme, means a person who has rights under the scheme which are attributable (directly or indirectly) to a pension credit,

“pension credit rights”, in relation to an occupational pension scheme, means rights to future benefits under the scheme which are attributable (directly or indirectly) to a pension credit.”.
- (4)

After subsection (2) there is inserted—

“(2A) In subsection (2)(a), the reference to rights which have accrued to or in respect of the member does not include any rights which are pension credit rights.”
- 62

(1)

Section 166 is amended as follows.

(2)

In subsection (4), for “scheme” there is substituted “ arrangement ”.

(3)

In subsection (5)(d), for “scheme” there is substituted “ arrangement ”.
- 63

In section 167(4)—

(a)

for “scheme”, where first occurring, there is substituted “ arrangement ”, and

(b)

for the words from “(“pension scheme”” to the end of the subsection there is substituted “ (“pension arrangement” having the meaning given in subsection (1) of section 27 of that Act, as it has effect for the purposes of subsection (5) of the said section 10). ”

Family Law Act 1996 (c.27)

F1264

Textual Amendments

F12 Sch. 12 paras. 64-66 repealed (13.5.2014) by Children and Families Act 2014 (c. 6), ss. 18(3)(b)(iii), 139(4)

F1265

Textual Amendments

F12 Sch. 12 paras. 64-66 repealed (13.5.2014) by Children and Families Act 2014 (c. 6), ss. 18(3)(b)(iii), 139(4)

F1266

Changes to legislation: There are currently no known outstanding effects for the Welfare Reform and Pensions Act 1999, Part I. (See end of Document for details)

Textual Amendments

F12 Sch. 12 paras. 64-66 repealed (13.5.2014) by Children and Families Act 2014 (c. 6), ss. 18(3)(b)(iii), 139(4)

Changes to legislation:

There are currently no known outstanding effects for the Welfare Reform and Pensions Act 1999, Part I.