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STATUTORY INSTRUMENTS

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**2008 No. 1050**

**The Occupational Pension Schemes (Transfer Values) (Amendment) Regulations 2008**

**Amendment of regulation 11 of the principal Regulations**

**5.** Regulation 11 of the principal Regulations (disclosure)(1) is amended as follows—

(a) for paragraph (1), substitute—

“(1) Subject to paragraphs (1A) and (1B), an active member of any scheme, and a deferred member of a money purchase scheme, is entitled to receive from the trustees, on request, the information mentioned in Schedule 1 in writing.

(1A) Paragraph (1) does not apply where the request is made within 12 months of the last occasion that such information was provided to the member.

(1B) Information provided under paragraph (1) is to be provided by the trustees as soon as reasonably practicable, and in any event within three months after the date that the member makes the request.”;

(b) omit paragraph (2);

(c) in paragraph (3) for “paragraphs (1) and (2)”, substitute “paragraph (1)”;

(d) in paragraph (4)(b)(ii)—

(i) for “regulation 8” in both places where it appears, substitute “Schedule 1A”; and

(ii) before “cash equivalent” in the first place where it appears, insert “initial”;

(e) omit paragraphs (4)(b)(i) and (4)(b)(vi)(cc);

(f) at the end of paragraph (4)(b)(vi)(aa), insert “and”; and

(g) after paragraph (4)(b), insert—

“(c) the information mentioned in paragraph 3 of Schedule 1.”.