

## STATUTORY INSTRUMENTS

# 2013 No. 2734

## The Occupational and Personal Pension Schemes (Disclosure of Information) Regulations 2013

### PART 7

#### Information about benefits in payment

##### Changes to benefits

**22.**—(1) The information listed in paragraphs 6, 8 and 9 of Schedule 7 must be given to a person in accordance with paragraph (2) where—

- (a) the amount of benefit payable to the person alters, and
- (b) that alteration is not made in accordance with the provisions referred to in paragraph 7(b) of Schedule 7.

(2) The information must be given before the date on which the decision to alter the benefit takes effect, where possible and in any event within one month of that date.

[<sup>F1</sup>(3) This regulation does not apply where regulation 22B applies.]

##### Textual Amendments

**F1** Reg. 22(3) inserted (1.8.2022) by [The Occupational Pension Schemes \(Collective Money Purchase Schemes\) \(Modifications and Consequential and Miscellaneous Amendments\) Regulations 2022 \(S.I. 2022/337\)](#), regs. 1(3), **13(8)**

##### [<sup>F2</sup>Benefit adjustment information: collective money purchase schemes

**22A.**—(1) Information listed in paragraphs 15 to 20 of Schedule 7 must be provided in accordance with this regulation to members and beneficiaries of a collective money purchase scheme.

- (2) The information must be given each time an actuarial valuation is obtained—
- (a) as soon as reasonably practicable after the certification of the actuarial valuation by the scheme actuary, and
  - (b) no less than six weeks before any adjustment to the rate or amount of benefits provided under the scheme following the latest actuarial valuation is applied, where reasonably practicable.

##### Textual Amendments

**F2** Regs. 22A, 22B inserted (1.8.2022) by [The Occupational Pension Schemes \(Collective Money Purchase Schemes\) \(Modifications and Consequential and Miscellaneous Amendments\) Regulations 2022 \(S.I. 2022/337\)](#), regs. 1(3), **13(9)**

### **Incorrect benefit adjustments in collective money purchase schemes**

**22B.**—(1) The information listed in paragraphs 21 to 27 of Schedule 7 must be given in accordance with this regulation where—

- (a) the scheme is a collective money purchase scheme, and
- (b) a benefit adjustment has not been applied in accordance with the scheme rules or (as the case may be) the latest actuarial valuation.

(2) The information must be given as soon as reasonably practicable to members and beneficiaries who have been or will be affected by the failure to apply the benefit adjustment in accordance with the scheme rules or (as the case may be) the latest actuarial valuation.]

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#### **Textual Amendments**

- F2** [Regs. 22A, 22B](#) inserted (1.8.2022) by [The Occupational Pension Schemes \(Collective Money Purchase Schemes\) \(Modifications and Consequential and Miscellaneous Amendments\) Regulations 2022 \(S.I. 2022/337\)](#), regs. 1(3), **13(9)**

**Changes to legislation:**

There are currently no known outstanding effects for the The Occupational and Personal Pension Schemes (Disclosure of Information) Regulations 2013, PART 7.