
STATUTORY INSTRUMENTS

2013 No. 2734

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

PART 6

Lifestyling and accessing benefits

Second information on accessing benefits

20.—(1) The information mentioned in paragraph (2) must be given to a person in accordance with this regulation where benefit under the scheme has, or is about to, become payable to the person.

(2) The information is the information listed—

- (a) in paragraphs 6 to 9 of Schedule 7, ^{F1}...
- (b) in Part 1 of that Schedule where the person has an opportunity to select an annuity under any rights and options in relation to the death of the member^{F2}; and
- (c) in Part 1 of Schedule 10 (information on the pensions guidance) where the person, under any rights and options in relation to the death of the member, has an opportunity to—
 - (i) transfer accrued rights to flexible benefits out of the scheme under the scheme rules;
 - (ii) apply sums or assets held for the purpose of providing flexible benefits for purchasing an annuity;
 - (iii) take payment of a lump sum in respect of flexible benefits; or
 - (iv) designate sums or assets held for the purpose of providing flexible benefits as available for the payment of drawdown pension.]

(3) The information mentioned in paragraph (2)(a) must be given—

- (a) where benefit becomes payable on or after normal pension age before benefit becomes payable, if practicable and in any event within one month after benefit becomes payable, or
- (b) where benefit becomes payable on a date before normal pension age, within two months of that date.

^{F3}(4) Before benefit becomes payable—

- (a) the information mentioned in sub-paragraph (b) of paragraph (2) must be given to a person having the opportunity mentioned in that sub-paragraph;
- (b) the information mentioned in sub-paragraph (c) of paragraph (2) must be given to a person having an opportunity mentioned in that sub-paragraph.]

Textual Amendments

- F1** Word in reg. 20(2)(a) omitted (6.4.2015) by virtue of [The Occupational and Personal Pension Schemes \(Disclosure of Information\) \(Amendment\) Regulations 2015 \(S.I. 2015/482\)](#), regs. 1, **9(2)(a)** (with reg. 15)

Changes to legislation: There are currently no known outstanding effects for the The Occupational and Personal Pension Schemes (Disclosure of Information) Regulations 2013, Section 20. (See end of Document for details)

- F2** Reg. 20(2)(c) and word inserted (6.4.2015) by The Occupational and Personal Pension Schemes (Disclosure of Information) (Amendment) Regulations 2015 (S.I. 2015/482), regs. 1, **9(2)(b)** (with reg. 15)
- F3** Reg. 20(4) substituted (6.4.2015) by The Occupational and Personal Pension Schemes (Disclosure of Information) (Amendment) Regulations 2015 (S.I. 2015/482), regs. 1, **9(3)** (with reg. 15)

Changes to legislation:

There are currently no known outstanding effects for the The Occupational and Personal Pension Schemes (Disclosure of Information) Regulations 2013, Section 20.