

SCHEDULE 3

THE BUSINESS PLAN

PART 1

Information to be included in the business plan

Information about the Master Trust scheme

6. The registered name of the scheme.

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Commencement Information

I1 Sch. 3 para. 6 in operation at 27.3.2024, see [reg. 1](#)

7. If different, any trading or brand name under which the scheme is promoted or marketed.

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Commencement Information

I2 Sch. 3 para. 7 in operation at 27.3.2024, see [reg. 1](#)

8. The date when the scheme was established.

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Commencement Information

I3 Sch. 3 para. 8 in operation at 27.3.2024, see [reg. 1](#)

9. The address of the scheme's registered office.

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Commencement Information

I4 Sch. 3 para. 9 in operation at 27.3.2024, see [reg. 1](#)

10. The name of—

- (a) each scheme trustee;
- (b) each scheme funder (except where regulation 287(1) applies to the scheme), and
- (c) each scheme strategist.

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Commencement Information

I5 Sch. 3 para. 10 in operation at 27.3.2024, see [reg. 1](#)

11. The name and address of any scheme administrator.

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Commencement Information

I6 Sch. 3 para. 11 in operation at 27.3.2024, see [reg. 1](#)

Changes to legislation: There are currently no known outstanding effects for the The Occupational Pension Schemes (Master Trusts) Regulations (Northern Ireland) 2024, Cross Heading: Information about the Master Trust scheme. (See end of Document for details)

12. The number of participating employers.

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Commencement Information

I7 Sch. 3 para. 12 in operation at 27.3.2024, see [reg. 1](#)

13. The number of members, broken down into active members, deferred members and pensioner members.

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Commencement Information

I8 Sch. 3 para. 13 in operation at 27.3.2024, see [reg. 1](#)

14. The numbers of members joining, transferring from and leaving the scheme in the 3 years ending with the effective date.

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Commencement Information

I9 Sch. 3 para. 14 in operation at 27.3.2024, see [reg. 1](#)

15. The scheme's pension registry number.

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Commencement Information

I10 Sch. 3 para. 15 in operation at 27.3.2024, see [reg. 1](#)

16. The scheme's HM Revenue & Customs reference number.

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Commencement Information

I11 Sch. 3 para. 16 in operation at 27.3.2024, see [reg. 1](#)

Changes to legislation:

There are currently no known outstanding effects for the The Occupational Pension Schemes (Master Trusts) Regulations (Northern Ireland) 2024, Cross Heading: Information about the Master Trust scheme.