
STATUTORY INSTRUMENTS

2013 No. 2734

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

PART 2

Information for new and prospective members

Basic scheme information

6.—(1) The basic scheme information mentioned in paragraph (2) must be given in accordance with this regulation.

(2) The basic scheme information is the information listed in—

- (a) Part 1 of Schedule 2, and
- (b) Part 3 of that Schedule where the scheme contains provision for lifestyling (see regulation 18).

(3) The information must be given to—

- (a) prospective members, if it is practicable to do so, and
- (b) members who have not already been given the information.

(4) The information must also be given to a relevant person who—

- (a) makes a request for the information, and
- (b) has not been given that information in the previous 12 months.

(5) Where the trustees or managers of the scheme have in relation to a member or prospective member received jobholder information, the information must be given within one month of the date that information was received.

(6) Where the trustees or managers of the scheme have not received jobholder information in relation to a member or prospective member, the information must be given within two months of the date the person became an active member of the scheme.

(7) Where the trustees or managers of the scheme have received a request for the information from a relevant person, the information must be given within two months of that request.

(8) No information is required to be given under this regulation to—

- (a) a relevant person, except a recognised trade union, unless it is relevant to the person's rights or prospective rights under the scheme, and
- (b) a recognised trade union unless it is relevant to the rights or prospective rights of persons who are in that recognised trade union.

(9) In this regulation “jobholder information” means the information specified in regulation 3 of the Occupational and Personal Pension Schemes (Automatic Enrolment) Regulations 2010⁽¹⁾ (jobholder information).

(1) [S.I. 2010/772](#).

Basic scheme information to be given by certain schemes

7.—(1) The basic scheme information mentioned in paragraph (2) must be given in accordance with this regulation.

- (2) The basic scheme information is the information listed in—
 - (a) Part 2 of Schedule 2, and
 - (b) Part 3 of that Schedule where the scheme contains provision for lifestyling (see regulation 18).
- (3) The information must be given to—
 - (a) prospective members,
 - (b) members who have not already been given the information, and
 - (c) a recognised trade union on request.
- (4) The information must be given to—
 - (a) a prospective member, if it is practicable to do so,
 - (b) a member within two months of membership beginning, and
 - (c) a recognised trade union within two months of the date the request is made.