
STATUTORY INSTRUMENTS

1995 No. 3213

The Pensions (Northern Ireland) Order 1995

PART II

OCCUPATIONAL PENSIONS

Functions of trustees or managers

Provision of documents for members

- 41.**—(1) Regulations may require the trustees or managers of an occupational pension scheme—
- (a) to obtain at prescribed times the documents mentioned in paragraph (2), and
 - (b) to make copies of them, and of the documents mentioned in paragraph (3), available to the persons mentioned in paragraph (4).
- (2) The documents referred to in paragraph (1)(a) are—
- (a) the accounts audited by the auditor of the scheme,
 - (b) the auditor's statement about contributions under the scheme,
 - (c) a valuation by the actuary of the assets and liabilities of the scheme, and a statement by the actuary concerning such aspects of the valuation as may be prescribed.
- (3) The documents referred to in paragraph (1)(b) are—
- (a) any valuation, or certificate, prepared under Article 57 or 58 by the actuary of the scheme,
 - (b) any report prepared by the trustees or managers under Article 59(3).
- (4) The persons referred to in paragraph (1)(b) are—
- (a) members and prospective members of the scheme,
 - (b) spouses of members and of prospective members,
 - (c) persons within the application of the scheme and qualifying or prospectively qualifying for its benefits,
 - (d) independent trade unions recognised to any extent for the purposes of collective bargaining in relation to members and prospective members of the scheme.
- (5) Regulations may in the case of occupational pension schemes to which Article 47 does not apply—
- (a) prescribe the persons who may act as auditors or actuaries for the purposes of paragraph (2), or
 - (b) provide that the persons who may so act shall be—
 - (i) persons with prescribed professional qualifications or experience, or
 - (ii) persons approved by the Department.

(6) Regulations shall make provision for referring to an industrial tribunal any question whether an organisation is such a trade union as is mentioned in paragraph (4)(d) and may make provision as to the form and content of any such document as is referred to in paragraph (2).