



Pensions Act 2004

2004 CHAPTER 35

PART 8

STATE PENSIONS

Miscellaneous

298 Disclosure of state pension information

- (1) Section 42 of the Child Support, Pensions and Social Security Act 2000 (c. 19) (disclosure of state pension information) is amended as follows.
- (2) In subsection (2), for the words from the beginning to “information”, substitute, “ The Secretary of State may, in the prescribed manner, disclose or authorise the disclosure of any information ”.
- (3) After subsection (3) insert—

“(3A) For the purposes of this section and of any regulations made under it, anything done by or in relation to a person who—

- (a) provides, or proposes to provide, relevant services to a person falling within subsection (3) (“the qualifying person”), and
- (b) is authorised in writing by the qualifying person to act for the purposes of this section,

is treated as done by or in relation to the qualifying person.

In paragraph (a) “relevant services” means services that may involve the giving of advice or forecasts to which information to which this section applies may be relevant.”

- (4) In subsection (7)—
 - (a) omit the “and” at the end of paragraph (c), and
 - (b) after paragraph (d) insert—, and

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Changes to legislation: Pensions Act 2004, Cross Heading: Miscellaneous is up to date with all changes known to be in force on or before 25 June 2024. There are changes that may be brought into force at a future date. Changes that have been made appear in the content and are referenced with annotations. (See end of Document for details)

“(e) a projection of the amount of any lump sum to which that individual is likely to become entitled, or might become entitled in particular circumstances.”

(5) In subsection (11)—

(a) for the definitions of “basic retirement pension” and “additional retirement pension”, substitute—

““additional retirement pension” means any additional pension or shared additional pension under the Social Security Contributions and Benefits Act 1992, or any graduated retirement benefit under sections 36 and 37 of the National Insurance Act 1965;

“basic retirement pension” means any basic pension under the Social Security Contributions and Benefits Act 1992;”,

(b) after the definition of “employer”, insert—

““lump sum” means a lump sum under Schedule 5 or 5A to the Social Security Contributions and Benefits Act 1992;”, and

(c) for the definitions of “trustee” and “manager”, substitute—

““trustee or manager”, in relation to an occupational or personal pension scheme, means—

(a) in the case of a scheme established under a trust, the trustee or trustees of the scheme, and

(b) in any other case, the person or persons responsible for the management of the scheme.”

Commencement Information

I1 S. 298 partly in force; s. 298(1)-(3)(5)(a)(c) in force at Royal Assent see s. 322

I2 S. 298(4)(5)(b) in force at 6.4.2005 by [S.I. 2005/275](#), art. 2(7), [Sch. Pt. 7](#)

299 Claims for certain benefits following termination of reciprocal agreement with Australia

(1) This section applies to claims for—

- (a) retirement pension,
- (b) bereavement benefit, or
- (c) widow’s benefit,

made on or after 1st March 2001 (the date from which the termination of the reciprocal agreement with Australia had effect).

(2) This section also applies to claims for retirement pension or widow’s benefit made before 1st March 2001 if the claimant only became entitled to the pension or benefit on or after that date.

(3) For the purposes of such claims—

- (a) the relevant provisions of the reciprocal agreement with Australia shall be treated as continuing in force as provided by this section; and

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- (b) the relevant UK legislation shall have effect as if modified to the extent required to give effect to those provisions (as they continue in force by virtue of this section).
- (4) The relevant provisions of that agreement are treated as continuing in force as follows—
- (a) references to periods during which a person was resident in Australia are only to periods spent in Australia before 6th April 2001 and forming part of a period of residence in Australia which began before 1st March 2001;
 - (b) Articles 3(3) and 5(2) (entitlement by virtue of previous receipt of pension in Australia) apply only to persons who were last in Australia during a period falling within paragraph (a) above;
 - (c) references to the territory of the United Kingdom do not include the islands of Jersey, Guernsey, Alderney, Herm or Jethou;
 - (d) references to widow's benefit, widow's payment, widow's pension and widowed mother's allowance include, respectively, bereavement benefit, bereavement payment, bereavement allowance and widowed parent's allowance;
 - (e) for the purposes of claims by a widower—
 - (i) for retirement pension by virtue of his wife's insurance, or
 - (ii) for bereavement benefit,references to widows and husbands include, respectively, widowers and wives.
- (5) An order made under—
- (a) section 179 of the Social Security Administration Act 1992 (c. 5), or
 - (b) section 155 of the Social Security Administration (Northern Ireland) Act 1992 (c. 8),
- may, in consequence of a change in the law of Great Britain or, as the case may be, Northern Ireland, modify the relevant provisions of the reciprocal agreement with Australia as they are treated as continuing in force for the purposes of claims to which this section applies.
- (6) For the purposes of this section—
- (a) “the reciprocal agreement with Australia” means the agreement set out in Schedule 1 to the Social Security (Australia) Order 1992 (S.I. 1992/ 1312) and the Social Security (Australia) Order (Northern Ireland) 1992 (S.R. 1992 No. 269) (as amended by the exchange of notes set out in Schedule 3 to those Orders);
 - (b) “the relevant provisions” of that agreement are the provisions of Articles 1, 3, 5, 8, 18, 20 and 24, so far as they relate to the United Kingdom;
 - (c) “the relevant UK legislation” is—
 - (i) the Social Security Contributions and Benefits Act 1992 (c. 4);
 - (ii) the Social Security Administration Act 1992;
 - (iii) the Social Security Contributions and Benefits (Northern Ireland) Act 1992 (c. 7); and
 - (iv) the Social Security Administration (Northern Ireland) Act 1992;and, for the purposes of subsection (5), a change in the law of Great Britain or Northern Ireland includes any change made after the date of the reciprocal agreement with Australia.

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(7) In this section—

“retirement pension” has the meaning given by the reciprocal agreement with Australia;

“bereavement benefit” means bereavement payment, widowed parent’s allowance or bereavement allowance payable under the Social Security Contributions and Benefits Act 1992 or the Social Security Contributions and Benefits (Northern Ireland) Act 1992;

“widow’s benefit” means widow’s payment, widowed mother’s allowance or widow’s pension payable under either of those Acts.

(8) This section shall be deemed to have had effect at all times on and after 1st March 2001.

(9) Nothing in this section affects Article 2(2) of the Social Security (Australia) Order 2000 (S.I. 2000/3255) or Article 2(2) of the Social Security (Australia) Order (Northern Ireland) 2000 (S.R. 2000 No. 407) (which provide for cases where a person was in receipt of benefit on 28th February 2001 or had claimed a benefit to which he was entitled on or before that date).

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