

Status: Point in time view as at 06/04/2006.

Changes to legislation: Pensions Act 2004, SCHEDULE 10 is up to date with all changes known to be in force on or before 16 September 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)

SCHEDULES

SCHEDULE 10

Section 236

USE AND SUPPLY OF INFORMATION: PRIVATE PENSIONS POLICY AND RETIREMENT PLANNING

Use of information held by Secretary of State etc

- 1 (1) Section 3 of the Social Security Act 1998 (c. 14) (use of information) is amended as follows.
- (2) In subsection (1), for the words from “social security” to “training” substitute “ any of the matters specified in subsection (1A) below ”.
- (3) After subsection (1) insert—
- “(1A) The matters are—
- (a) social security, child support or war pensions;
- (b) employment or training;
- (c) private pensions policy;
- (d) retirement planning.”
- (4) In subsection (2)(a), for the words from “social security” to “training” substitute “ any of the matters specified in subsection (1A) above ”.
- (5) After subsection (4) insert—
- “(5) In this section—
- “private pensions policy” means policy relating to occupational pension schemes or personal pension schemes (within the meaning given by section 1 of the Pension Schemes Act 1993);
- “retirement planning” means promoting financial planning for retirement.”

Supply of information held by tax authorities

- 2 (1) This paragraph applies to information which is held—
- (a) by the Commissioners of Inland Revenue;
- (b) by a person providing services to the Commissioners of Inland Revenue, in connection with the provision of those services;
- (c) by the Commissioners of Customs and Excise;
- (d) by a person providing services to the Commissioners of Customs and Excise, in connection with the provision of those services.
- (2) Information to which this paragraph applies may be supplied—
- (a) to the Secretary of State or the Northern Ireland Department, or
- (b) to a person providing services to the Secretary of State or the Northern Ireland Department,

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for use for the purposes of functions relating to private pensions policy or retirement planning.

(3) In this paragraph—

“private pensions policy” means policy relating to occupational pension schemes or personal pension schemes;

“retirement planning” means promoting financial planning for retirement;

“the Northern Ireland Department” means the Department for Social Development in Northern Ireland.

Supply of housing benefit and council tax benefit information

3 (1) Section 122D of the Social Security Administration Act 1992 (c. 5) (supply of information by authorities administering housing benefit or council tax benefit) is amended as follows.

(2) In subsection (1) for “or employment or training” substitute “ employment or training, private pensions policy or retirement planning ”.

(3) After subsection (2) insert—

“(2A) Information supplied under subsection (2) may be used for any purpose relating to private pensions policy or retirement planning.”

(4) After subsection (5) insert—

“(6) In this section—

“private pensions policy” means policy relating to occupational pension schemes or personal pension schemes (within the meaning given by section 1 of the Pension Schemes Act 1993);

“retirement planning” means promoting financial planning for retirement.”

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