

SCHEDULE 1 **E+W+S**

Regulation 28

RELATED AMENDMENTS OF OTHER REGULATIONS

Amendment of the Occupational Pension Schemes (Discharge of Liability) Regulations 1985 **E+W+S**

^{F1}1.

Textual Amendments

F1 Sch. 1 revoked in part (6.4.1997) by [The Occupational Pension Schemes \(Discharge of Liability\) Regulations 1997 \(S.I. 1997/784\)](#), reg. 1(1), **Sch. 2**

Amendments of the Occupational Pension Schemes (Transfer Values) Regulations 1985 **E+W+S**

^{F2}2.

Textual Amendments

F2 Sch. 1 para. 2 revoked (6.4.1997) by [The Occupational Pension Schemes \(Transfer Values\) Regulations 1996 \(S.I. 1996/1847\)](#), reg. 1(1), **Sch. 3** (with reg. 21(2), Sch. 2)

Amendment of the Occupational Pension Schemes (Disclosure of Information) Regulations 1986 **E+W+S**

^{F3}3.

Textual Amendments

F3 Sch. 1 para. 3 revoked (6.4.1997) by [The Occupational Pension Schemes \(Disclosure of Information\) Regulations 1996 \(S.I. 1996/1655\)](#), reg. 1(1), **Sch. 4** (with reg. 2)

Amendment of the Occupational Pension Schemes (Auditors) Regulations 1987 **E+W+S**

4. Regulation 1(2) of the ^{M1} Occupational Pension Schemes (Auditors) Regulations 1987 (interpretation) is amended by replacing the words “regulation 2(4) and (5) of the Occupational Pension Schemes (Preservation of Benefit) Regulations 1984” in the definition of “employer” with the words “ regulation 2 of the Occupational Pension Schemes (Preservation of Benefit) Regulations 1991 ”.

Marginal Citations

M1 [S.I.1987/1102.](#)

Changes to legislation: There are currently no known outstanding effects for the The Occupational Pension Schemes (Preservation of Benefit) Regulations 1991. (See end of Document for details)

Amendments of the Occupational Pension Schemes (Qualifying Service-Consequential and Other Provisions) Regulations 1987 **E+W+S**

5.—(1) Regulation 6 of the ^{M2}Occupational Pension Schemes (Qualifying Service - Consequential and Other Provisions) Regulations 1987 (purpose for which the Occupational Pensions Board may modify occupational pension schemes) is amended as described in subparagraphs (2) and (3).

(2) Paragraph (a) is replaced with the following—

“(a) to provide the alternative to short service benefit described in regulation 9 of the Occupational Pension Schemes (Preservation of Benefit) Regulations 1991 (bought out benefits) without the member’s consent in the circumstances described in paragraph (5) (b) of that regulation; and”.

(3) In paragraph (b), the words “the conditions specified in regulation 5(c)” are replaced with the words “ the requirements of regulation 5(5) ”.

Marginal Citations
M2 [S.I. 1987/1106.](#)

SCHEDULE 2 **E+W+S**

Regulation 29

REVOCATIONS

Column 1 Regulations	Column 2 Extent of revocation
The Occupational Pension Schemes (Preservation of Benefit) Regulations 1984 (S.I. 1984/614)	The whole of the Regulations.
The Contracting-out (Transfer) Regulations 1985 (S.I. 1985/1323)	Regulation 4(6).
The Occupational Pension Schemes (Preservation of Benefit) Amendment Regulations 1985 (S.I. 1985/1926)	The whole of the Regulations.
The Contracting-out (Requisite Benefits-Consequential Provisions) Regulations 1986 (S.I. 1986/1716)	Regulation 4.
The Occupational Pension Schemes (Miscellaneous Amendments) Regulations 1986 (S.I. 1986/2171)	Regulation 2.
The Occupational Pension Schemes (Qualifying Service-Consequential and Other Provisions) Regulations 1987 (S.I. 1987/1106)	Regulation 3.
The Occupational Pension Schemes (Miscellaneous Amendments) Regulations 1988 (S.I. 1988/476)	Regulation 2.

The Personal and Occupational Pension Schemes (Miscellaneous Amendments) (No. 2) Regulations 1989 (S.I. 1989/1641) Regulation 2.

The Personal and Occupational Pension Schemes (Miscellaneous Amendments) Regulations 1990 (S.I. 1990/1141) Regulation 3.

The Personal and Occupational Pension Schemes (Miscellaneous Amendments) (No. 2) Regulations 1990 (S.I. 1990/1142) Regulation 3.

[^{F4} SCHEDULE 3 E+W+S

Regulation 12(3)

Actuary's certificate

Textual Amendments

F4 Sch. 3 inserted (6.4.2011) by [The Occupational and Personal Pension Schemes \(Miscellaneous Amendments\) Regulations 2011 \(S.I. 2011/672\)](#), reg. 1(2)(b), **Sch. 1**

Modifications etc. (not altering text)

C1 Sch. 3 modified by S.I. 2005/3381, reg. 21(2)(a) (as inserted (13.1.2019) by [The Occupational Pension Schemes \(Cross-border Activities\)\(Amendment\) Regulations 2018 \(S.I. 2018/1102\)](#), regs. 1(2), **3(7)**)

Given for the purposes of regulation 12(3) of the Occupational Pension Schemes (Preservation of Benefit) Regulations 1991.]

THIS CERTIFICATE IS SUBJECT TO THE NOTES BELOW

The name of the transferring scheme is:

The reference number of Her Majesty's Revenue and Customs for that scheme is:

The name of the receiving scheme is:

The reference number of Her Majesty's Revenue and Customs for that scheme is:

1. I certify that in my opinion, the transfer credits to be acquired for each member under the receiving scheme in the categories of member covered by this certificate are, broadly, no less favourable than the rights to be transferred.

2. Where it is the established custom for discretionary benefits or increases in benefits to be awarded under the transferring scheme, I certify that in my opinion, there is good cause to believe that the award of discretionary benefits or increases in benefits under the receiving scheme will (making allowance for any amount by which transfer credits under the receiving scheme are more favourable than the rights to be transferred) be, broadly, no less favourable.

Changes to legislation: There are currently no known outstanding effects for the The Occupational Pension Schemes (Preservation of Benefit) Regulations 1991. (See end of Document for details)

In making this certification:

- I used these benefits:

- I used this data:

- I used these key actuarial assumptions to value the rights, transfer credits, any discretionary benefits and any discretionary increases in benefits:

- I used these documents:

The categories of member covered by this certificate are:

Signature:

Date of signature:

Name:

Qualification:

Address:

Name of employer (if applicable):

Notes:

Phrases used in this certificate have the same meaning as in the Occupational Pension Schemes (Preservation of Benefit) Regulations 1991 (“the 1991 Regulations”).

The certification in paragraph 1 was made in accordance with regulation 12(4) of the 1991 Regulations. The certification in paragraph 2 was made in accordance with regulation 12(4A) of the 1991 Regulations.

This certificate is valid only for the purposes of the 1991 Regulations.

This certificate must not be taken by the trustees or managers of the scheme as authority to make a transfer without members’ consents. It must also not be taken as a recommendation to make a transfer without members’ consents. The trustees or managers of the scheme need to satisfy themselves that making the transfer is consistent with their duties to the transferring members and the remaining members. The trustees of the scheme need to satisfy themselves that making the transfer is consistent with their responsibilities and powers under trust law.

The actuary is not expressing in this certificate an opinion on whether or not the amount of the transfer value is reasonable.

The actuary has taken account of the benefits accrued by the date of this certificate. The actuary has not taken account of any differences between the terms and conditions of any benefits that may accrue in the future under the transferring scheme and the receiving scheme.

Changes to legislation:

There are currently no known outstanding effects for the The Occupational Pension Schemes (Preservation of Benefit) Regulations 1991.