
STATUTORY INSTRUMENTS

2013 No. 2734

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

PART 6

Lifestyling and accessing benefits

First information on accessing benefits

19.—(1) The information mentioned in paragraph (2) must be given in accordance with this regulation to a member who has [^{F1}a right or entitlement to flexible benefits].

[^{F2}(2) The information is—

(a) where the member has been given information in accordance with regulation 18A in the 12 months before the date on which the trustees or managers of the scheme give information under this regulation—

(i) a statement that the member has been given information about—

(aa) the flexible benefits that may be provided to the member;

(bb) the member's opportunity to transfer those benefits; and

(cc) the options available to the member under the scheme rules; and

(ii) that listed in paragraphs 1 to 9 of Schedule 10; and

(b) in any other case—

(i) a statement of the options available to the member under the scheme rules; and

(ii) where the member has an opportunity to transfer flexible benefits, that listed in Part 3 of Schedule 7 and in Schedule 10.]

(3) The information must be given at least four months before—

(a) where there is a retirement date, that date, or

(b) where there is no retirement date, the date the member attains normal pension age ^{M1}.

(4) For the purposes of paragraph (3) where the interval between the date on which the retirement date is specified and the date that the benefits will become payable is less than four months, the information must be given within [^{F3}20] days of the date on which the retirement date is specified.

(5) In this regulation, “retirement date” means the date specified by—

(a) the member to the trustees or managers of the scheme that is acceptable under the rules of the scheme, or

(b) the trustees or managers of the scheme where no acceptable date has been specified under sub-paragraph (a).

Textual Amendments

- F1** Words in reg. 19(1) substituted (6.4.2015) by [The Occupational and Personal Pension Schemes \(Disclosure of Information\) \(Amendment\) Regulations 2015 \(S.I. 2015/482\)](#), regs. 1, **8(2)** (with reg. 15)
- F2** Reg. 19(2) substituted (6.4.2015) by [The Occupational and Personal Pension Schemes \(Disclosure of Information\) \(Amendment\) Regulations 2015 \(S.I. 2015/482\)](#), regs. 1, **8(3)** (with reg. 15)
- F3** Word in reg. 19(4) substituted (6.4.2015) by [The Occupational and Personal Pension Schemes \(Disclosure of Information\) \(Amendment\) Regulations 2015 \(S.I. 2015/482\)](#), regs. 1, **8(4)** (with reg. 15)

Marginal Citations

- M1** See section 180 of the 1993 Act.

Changes to legislation:

There are currently no known outstanding effects for the The Occupational and Personal Pension Schemes (Disclosure of Information) Regulations 2013, Section 19.