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STATUTORY RULES OF NORTHERN IRELAND

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**2008 No. 370**

**The Occupational Pension Schemes (Transfer Values)  
(Amendment) Regulations (Northern Ireland) 2008**

**Amendment of regulation 11 of the principal Regulations**

5. In regulation 11 of the principal Regulations (disclosure)—
- (a) for paragraph (1) substitute—

“(1) Subject to paragraphs (1A) and (1B), an active member of any scheme, and a deferred member of a money purchase scheme, is entitled to receive from the trustees, on request, the information mentioned in Schedule 1 in writing.

(1A) Paragraph (1) does not apply where the request is made within 12 months of the last occasion on which such information was provided to the member.

(1B) Information provided under paragraph (1) is to be provided by the trustees as soon as reasonably practicable, and in any event within 3 months after the date on which the member makes the request.”;
  - (b) omit paragraphs (2) and (3);
  - (c) in paragraph (4)(b)—
    - (i) omit head (i);
    - (ii) in head (ii)—
      - (aa) for “member’s cash equivalent” substitute “member’s initial cash equivalent”;
      - (bb) for “regulation 8”, in both places where it occurs, substitute “Schedule 1A”;
    - (iii) in head (vi)(1)—
      - (aa) at the end of sub-head (aa) insert “and”;
      - (bb) at the end of sub-head (bb) omit “and”;
      - (cc) omit sub-head (cc);
  - (d) after paragraph (4)(b) add—

“(c) the information mentioned in paragraph 3 of Schedule 1.”.