
STATUTORY INSTRUMENTS

2013 No. 2734

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

PART 4

Information to be given on request

Annual report

12.—(1) A document containing the information listed in Part 2 of Schedule 3 must be prepared within seven months of the end of each scheme year and [^{F1}(subject to paragraph (5))] given in accordance with this regulation.

- (2) The document must be given to a relevant person where the relevant person—
- (a) makes a request for the document within five years of the end of the scheme year to which the information relates, and
 - (b) has not been given the document before.
- (3) The document must be given within two months of the date the request is made.
- (4) The document must be given in accordance with—
- (a) regulation 26 or 29(3), where the document relates to the most recent scheme year, or
 - (b) regulation 29, where the document does not relate to that year.

[^{F2}(5) Where section 35 of the 1995 Act applies to a scheme the following information must be made publicly available free of charge in accordance with regulation 29A—

- (a) the information listed in paragraph 30(ca) of Schedule 3 but only if the scheme is not a relevant scheme within the meaning of regulation 1(2) (interpretation) of the Occupational Pension Schemes (Scheme Administration) Regulations 1996; or
- (b) the information listed in paragraph 30(f) of that Schedule but only if the scheme is a relevant scheme within the meaning of that regulation.]

F1 Words in reg. 12(1) inserted (1.10.2020) by [The Pension Protection Fund \(Pensionable Service\) and Occupational Pension Schemes \(Investment and Disclosure\) \(Amendment and Modification\) Regulations 2018 \(S.I. 2018/988\)](#), regs. 1(3)(a), **5(2)(a)**

F2 Reg. 12(5) inserted (1.10.2020 (as substituted by 2019/982)) by [The Pension Protection Fund \(Pensionable Service\) and Occupational Pension Schemes \(Investment and Disclosure\) \(Amendment and Modification\) Regulations 2018 \(S.I. 2018/988\)](#), regs. 1(3)(a), **5(2)(b)**

Changes to legislation:

There are currently no known outstanding effects for the The Occupational and Personal Pension Schemes (Disclosure of Information) Regulations 2013, Section 12.