**Communication and Administration**

**Test**

1. For members of DB occupational schemes, which two of the following must be disclosed automatically?

1. Basic Scheme Information
2. Trustees' Report and Accounts
3. Leaver's Statement
4. Valuation Report

2. Regulations set out timescales for disclosure of certain pension scheme information to interested parties. Who, out of those people listed below, are interested parties, as defined by the regulations?  (choose four)

1. Beneficiaries
2. Credit screening organisations
3. Financial advisors
4. Members and prospective members
5. Recognised Trade Unions
6. Spouses of members and prospective members

3. Are these statements true or false?

1. Trustees are responsible for ensuring that there is a procedure in place to deal with disputes.
2. In a dispute it is not necessary by law to advise pension scheme members of the existence of the Pensions Advisory Service (TPAS) or the Pensions Ombudsman.

4. When were disclosure requirements first introduced?

1. April 1986
2. November 1986
3. April 1988
4. November 1988

5. Which type of scheme must produce annual Statutory Money Purchase Illustrations (SMPI) for its members?

1. Defined contribution schemes
2. Defined benefit schemes
3. All pension schemes
4. Only personal pension schemes

6. Which of the following must be automatically disclosed to members of Defined Contribution arrangements (choose two):

1. Annual Benefit Statement
2. Annual Report and Accounts
3. Trust Deed and Rules
4. Statutory Money Purchase Illustration

7. Which one of the following statements is true?

1. All schemes must produce a popular version of the trustees' annual report
2. All schemes must send the trustees' annual report to active members
3. All schemes must produce an annual report
4. All schemes must send the trustees' annual report to all members