

## GENERAL SYNOD

**THE CHURCH OF ENGLAND FUNDED PENSIONS SCHEME (HEALTH AND DISABILITY)  
(AMENDMENT) RULES 2010**

*Made by the Church of England Pensions Board* \*\*\*

*Approved by the General Synod* \*\*\*

*Coming into force* *1st January 2011*

The Church of England Pensions Board makes the following rules for the purposes of the Church of England Funded Pensions Scheme:

1. These rules shall come into force on 1st January 2011.
2. In these rules “the Scheme Rules” means the Rules of the Church of England Funded Pensions Scheme.
3. For Rule 2.4 of the Scheme Rules substitute—

**“2.4 Evidence of health**

If a person fails to provide evidence of good health which is satisfactory to the Board, the Board may:

**2.4.1** refuse him or her entry to the Scheme under Rule 2.1 or 2.2; or

**2.4.2** restrict any benefits payable on his or her death or early retirement.

This Rule only applies where such evidence has been specifically requested.”.

4. For Rule 5.1 of the Scheme Rules substitute—

**“5.1 Disability retirement benefits**

The Board will grant a Disability pension and lump sum under this Rule if:

**5.1.1** a Member applies for an early pension on grounds of Disability before leaving Service; and

**5.1.2** the Board is satisfied that the Member is suffering from Disability which is likely to be permanent.

The pension and lump sum will be calculated as described in Rule 3.1 but Pensionable Service will include an additional amount equal to:

$$A \times P$$


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T

where:

A is actual completed Service;

T is actual completed Service plus the Pensionable Service the Member could have completed if he or she remained in Pensionable Service up to Retiring Age; and

P is the period between leaving Service and Retiring Age.

If the Member was in part-time Service or earning less than the National Minimum Stipend immediately before leaving Service, this Pensionable Service will be calculated on the assumption that the Member would have continued in the same Service and earning the same proportion of the National Minimum Stipend until Retiring Age.

The pension will be payable with effect from the day following cessation of Service.”.

5. For Rule 5.2 of the Scheme Rules substitute—

**“5.2 Preserved benefits payable early on grounds of Disability**

The Board will grant a Disability pension and lump sum under this Rule if:

**5.2.1** a Member entitled to preserved benefits applies to receive them before Retiring Age on grounds of Disability after leaving Service; and

**5.2.2** the Board is satisfied that the Member is suffering from Disability which is likely to be permanent.

The pension and lump sum will be equal to the Member’s preserved benefits under Rule 4.1, including increases as if the Revaluation Laws applied in respect of the period between the date on which the Member left Service and the date on which the pension and lump sum become payable. If the Board has granted additional increases to the Member’s preserved benefits under Rule 4.1, the benefits under this Rule will also take account of those increases.

The pension and lump sum will become payable on the date on which the application is approved, or such earlier date as the Board may decide.”.

6. For Rule 6.3 of the Scheme Rules substitute—

**“6.3 Member dies before Retiring Age while receiving a Disability pension under Rule 5.1**

If a Member dies before Retiring Age while receiving a Disability pension under Rule 5.1 (Disability retirement benefits), a lump sum death benefit will be payable as described in Rule 6.4.

The benefit will be based on the amount that would have been payable under Rule 6.1 if the Member had died immediately before leaving Service, but based on the National Minimum Stipend in the 12 months ending on the last 31 March before the Member’s death (the “**Basic Benefit**”).

If the Member dies within 12 months after leaving Service, the benefit will be equal to the Basic Benefit less the Basic Lump Sum paid on retirement and less the payment made to the Member’s estate under Rule 6.2.

If the Member dies between 12 months and 36 months after leaving Service the benefit will be equal to:

**6.3.1** the Basic Benefit reduced by 1/24 per complete month starting with month 13 after leaving Service; less

**6.3.1** the Basic Lump Sum paid on retirement.

If a Member dies before Retiring Age while receiving a Disability pension under Rule 5.2 (preserved benefits payable early on grounds of Disability), no lump sum death benefit will be payable under this Rule.”.

Church House, Westminster

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