

Personalised Guidepath

Five reasons to recommend GuidePath to your customers



| | | |
|------------|---|--|
| <h1>1</h1> | <p>An Investment Strategy built on Zurich's Prisma Funds.</p> | <ul style="list-style-type: none"> • Market leading multi-asset range with over €6.2bn invested across the 5 funds in the Prisma range • Managed by Zurich Investments – enviable track record in delivering superior performance • Using the Prisma funds makes it simple to explain the de-risk journey. |
| <h1>2</h1> | <p>Offers a strong 'default' option suitable for the majority of investors.</p> | <ul style="list-style-type: none"> • The 'default' option is set to medium risk/return. • Medium risk/return moves from Prisma 5 in the early growth stage through to Prisma 4 in the mid-growth stage • The default retirement planning stage ends in 25% Tax free cash and 75% Annuity for Personal, Executive and DC pensions. For PRB's it is set to 50% TFC / 50% Annuity. |
| <h1>3</h1> | <p>Recognises people are individuals and enables personalisation in 3 key ways.</p> | <ol style="list-style-type: none"> 1. Risk/return preference – choose between low, medium or high 2. Personalised retirement benefit mix targeted in the retirement planning stage (final five years) 3. Flexible strategy target end date – retire early or late <ul style="list-style-type: none"> • Ability to change any of these elements at any time, as often as needed • Ability to target a different benefit mix with an individual's AVC pot. |
| <h1>4</h1> | <p>New customer dashboard functionality to enable online transactions.</p> | <ul style="list-style-type: none"> • Allows online transactions to implement personalisation. Accessible via Zurich customer dashboard • Range of tools to help educate and enable informed decision making: risk profiler, tax free cash calculator, annuity vs ARF tool • Strong engagement process to encourage customer to use the dashboard functionality. Direct mailing at key decision points, pop-up prompts and clear signposting on the dashboard. |
| <h1>5</h1> | <p>Most innovative and flexible investment strategy in Ireland – awarded 'Best Innovation in Financial Services 2017' at the Longboat Analytics awards.</p> | |



Zurich Life Assurance plc

Zurich House, Frascati Road, Blackrock, Co. Dublin, A94 X9Y3, Ireland.

Telephone: 01 283 1301 Fax: 01 283 1578 Website: www.zurich.ie

Zurich Life Assurance plc is regulated by the Central Bank of Ireland.

Intended for distribution within the Republic of Ireland.

GR: 6437 Print Ref: ZL ISA 4323 1121

