

2017 - A focus on simplifying our investment fund range

Over the course of 2017 we will be making some changes to simplify, streamline and enhance our investment offering.

At Zurich our objective is to provide you and your customers with access to award winning active investment management, great long term consistent performance and an investment range that covers all asset classes and sectors. And in 2017 we promise to deliver greater clarity in our investment offering.

To start the year as we mean to continue, we are making the following enhancements:

- Renaming the **Pathway Multi-Asset Funds** as the **Prisma Multi-Asset Funds**.
- Introducing exciting **product offers** to give you a 'quickstart' to 2017.
- Opening up our most popular '**externally managed**' funds to regular contributions.
- **Streamlining our fund range**.
- Adding **Dimensional Fund Advisors** to our fund range.

Pathway becomes Prisma

First for 2017, we are changing the name of Ireland's top performing suite of risk-targeted investment funds. From the end of January, the Pathway Funds will become known as the Prisma Funds and we are moving away from the Prisma branding for the Zurich Investment Platform (and the various tools within it). We believe this will help simplify your investment communications.

And what else is changing with the renaming of Pathway to Prisma? Nothing! Other than a name change, the Prisma Funds are the Pathway Funds in every way. They continue to have the same active investment philosophy, the same asset allocation strategy and the same award winning investment team. Coupled of course with the same great pricing! In 2016, our multi-asset funds were the top performing risk targeted multi-asset funds in Ireland - just [click here](#) to see how they have performed since launch.

The name change will 'go live' on **31 January** when we update our website and systems. We will be writing to all investors in the funds to notify them of the name change and highlight the positive performance of the range of funds.

Exciting product offers to give you a 'quickstart' to 2017 - Available till the end of March, we have a range of special offers across our Pension, PRSA, Savings and Investments products. These include increasing the maximum investment into the Easy Access Bond to €200,000, continuing the great 1% AMC and 0.75% AMC allocation terms on the LifeSave Bond, and great commission offers on our Pension/PRSA range. For all the details, make sure to speak to your Broker Consultant.

Opening funds to regular contributions - Currently we offer over 60 investment funds – some of which are only available for single contributions. To simplify this, we have made our most popular 'externally managed' funds available for regular contributions. This includes the Global Targeted Returns Fund and funds from JP Morgan.

Streamlining our fund range - Over the next couple of weeks we will begin a process of streamlining our fund range and removing a number of funds. For the time being these funds will remain open for existing customers. Please [click here](#) for a list of the funds that are closing.

Dimensional Fund Advisors - Late last year we added eight new investment funds from Dimensional to the Zurich fund range. Dimensional is one of the world's leading investment managers and including a number of their funds on the Zurich Platform is a significant addition. These funds are available across our pension and investment product range for both single and regular contributions. For more information, [click here](#). Please note that under the arrangement Zurich has with Dimensional Fund Advisors, we will provide them with details on Advisors who have clients invested in the Dimensional funds.

Customer Portfolio Risk Rating - In December, we notified you on an error on our 'Customer Portfolio Risk Rating' which we corrected. Early next week we will be writing to customers that had logged into the client centre during October and November.

As we move further into 2017, you'll hear much more about our enhancements but if you have any queries, please don't hesitate to get in touch.

Quick Links

Broker Centre	Product Information	Calculators	Secure Log In
-------------------------------	-------------------------------------	-----------------------------	-------------------------------