

Personalised Guidepath

Five reasons to recommend GuidePath to your customers



1	An Investment Strategy built on Zurich's Prisma Funds.	• 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.
2	Offers a strong 'default' option suitable for the majority of investors.	• 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.
3	Recognises people are individuals and enables personalisation in 3 key ways.	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 • 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.
4	New customer dashboard functionality to enable online transactions.	• 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.
5	Most innovative and flexible investment strategy in Ireland – awarded 'Best Innovation in Financial Services 2017' at the Longboat Analytics awards.	

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