

# Zurich Rate of Return Calculator

Retirement can seem a long way off, and it's easy to lose track of how the assets within your plan are performing to help provide for your retirement.

With Zurich's Rate of Return Calculator, you can see how the money paid into your Retirement Account is working for you.

## Using Zurich's Rate of Return Calculator, you can:

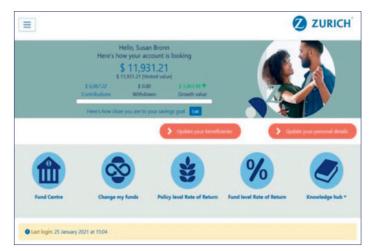
- calculate a rate of return at both policy and fund level
- calculate a rate of return for any or all policies held within your Retirement Account
- · see how an investment strategy has performed by selecting a single policy or selected multiple policies
- · calculate an overall rate of return for your Retirement Account by selecting all policies
- · select a fund level rate of return to calculate the rate of return for funds within a single policy
- calculate a rate of return in any of the available plan currencies
- obtain a rate of return summary, or a detailed report showing all transactions in your Retirement Account, during the time period selected, emailed directly to your Zurich International online (ZIO) inbox.

## Accessing the Rate of Return Calculator

The Rate of Return Calculators can be found on your ZIO home page, in the tools area. From here you can access either a policy level or fund level rate of return.

### In just three simple steps you can obtain a rate of return:

- 1) Select the policy(ies) to be modelled: single, multiple or fund level.
- Enter the time period for which you want to calculate the rate of return.
- 3) Select the currency to be used for the calculation.



number	Policy descr					
		ription	tion Policy currency		icy start date	Policy value
5	AVC		GBP	01 October 2016		1,231.71
3	Employer		GBP	01 October 2016		5,543.07
	Transfer		GRP	01	November 2016	106,542.1
lease select the start date for the calculation: Ple			Please select the end date for the calculation:		Please select the currency for the calculation:	
10 December 2019			10 December 2020		British Pounds	
	n start date for	8 Transfer start date for the calculation:	II Transfer start date for the calculation: Please sele	II Transfer GIIP start date for the calculation: Please select the end date for the calcu	II Transfer CIIP 011 start date for the calculation: Please select the end date for the calculation:	II Transfer GIIP III November 2016 start date for the calculation: Please select the end date for the calculation: Please select the eurren

	Policy number Policy descrip		ption Policy currency		Policy start date	Policy value
0	8327155	AVC.		GBP	01 October 2016	1,231.7
0	8327163	Employer		GBP	01 October 2016	5,543.0
0	8333128	Transfer		GBP	01 November 2016	106,542.12
Please	select the start date for	the calculation:	Please sel	ect the end date for the calcu	lation:	
10 December 2019			10 December 2020			
Calo	utate					
	ant notes					
he Rat	e of Return Calculator always pr				cted for the calculation. This means that shon t serv. For example, a 10% gain over a 5 month p	

ZURICH

For further information please see the Zurich Rate of Return Calculator user guide and frequently asked questions document, or contact your plan administrator.

≡



### Important information

Zurich International Life Limited is fully authorised under the Isle of Man Insurance Act 2008 and is regulated by the Isle of Man Financial Services Authority which ensures that the company has sound and professional management and provision has been made to protect planholders.

For life assurance companies authorised in the Isle of Man, the Isle of Man's Life Assurance (Compensation of Policyholders) Regulations 1991, ensure that in the event of a life assurance company being unable to meet its liabilities to its planholders, up to 90% of the liability to the protected planholders will be met.

The protection only applies to the solvency of Zurich International Life Limited and does not extend to protecting the value of the assets held within any unit-linked funds linked to your plan.

Zurich International Life Limited is not authorised to offer insurance products for sale in the United States. Materials are not intended as an offer to invest and do not constitute an offer or a solicitation of an offer to buy securities in any other country or other jurisdiction in which it is unlawful to make such an offer or solicitation.

Zurich International Life Limited, Bahrain Branch, which is registered in Bahrain under Commercial Registration No. 17444 and is licensed as an Overseas Insurance Firm – Life Insurance by the Central Bank of Bahrain. Branch offices: 27th Floor, Almoayyed Tower, Seef District, Kingdom of Bahrain. Telephone +973 1756 3322.

Zurich International Life Limited, UAE Branch, which is registered (Registration No. 63) under UAE Federal Law Number 6 of 2007, and its activities in the UAE governed by such law. Registered offices at Unit 601, Building 6, Emaar Square, Dubai. (PO Box 50389 Dubai) Telephone: +971 4 425 2300 www.zurich.ae

Zurich International Life Limited, Qatar Branch, which is authorised by the Qatar Financial Centre Regulatory Authority.

Branch offices: Office No. 404, 4th Floor, Qatar Financial Centre Tower, West Bay, Doha, Qatar. Telephone: + 974 4428 6322.

Zurich International Life Limited provides life assurance, investment and protection products and is authorised by the Isle of Man Financial Services Authority.

Registered in the Isle of Man number 20126C.

Registered office: Zurich House, Isle of Man Business Park, Douglas, Isle of Man, IM2 2QZ, British Isles. Telephone +44 1624 662266 Telefax +44 1624 662038 www.zurich.com

