

# 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 corporate retirement savings plan are performing to help provide for your retirement.

With Zurich's new 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.

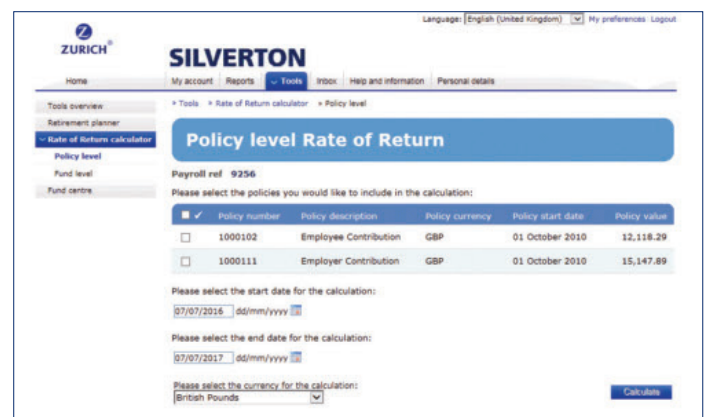
For further information please see the Zurich Rate of Return Calculator user guide and frequently asked questions document, or contact your plan administrator.

## Accessing the Rate of Return Calculator

Access to the Rate of Return Calculator is through your existing access to ZIO.

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.
- 2) Enter the time period for which you want to calculate the rate of return.
- 3) Select the currency to be used for the calculation.



The screenshot shows the Zurich Silverton online interface. The breadcrumb trail is: Home > My account > Reports > Tools > Rate of Return calculator > Policy level. The main heading is "Policy level Rate of Return". Below this, the payroll reference is 9256. A table lists policies to be included in the calculation:

<input checked="" type="checkbox"/>	Policy number	Policy description	Policy currency	Policy start date	Policy value
<input checked="" type="checkbox"/>	1000102	Employee Contribution	GBP	01 October 2010	12,118.29
<input type="checkbox"/>	1000111	Employer Contribution	GBP	01 October 2010	15,147.89

Below the table, there are fields to select the start date (07/07/2015), end date (07/07/2017), and currency (British Pounds). A "Calculate" button is visible at the bottom right.

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