

Zurich International online

Zurich International online is an internet based enquiry and administration support system designed for employers and employees in Zurich International Life's savings and retirement plans.



Easy access online administration

Zurich International online (ZIO) offers round the clock, password protected access for plan administrators and employees. Using ZIO to set up and maintain the plan makes life easy, location isn't a problem either – ZIO provides centralised administration anytime, anywhere in the world. Whether you want an answer to a query, run a report, manage member or contribution information – it can all be done by the click of a button.

As well as viewing plan and member information, most administrative functions can be carried out online by the plan member. This helps to reduce the number of enquiries the plan administrator receives, thus reducing time spent administering the plan.

Processes are controlled by electronic workflow management, which allows plan administrators to view, approve or reject transactions online, which removes the delays of a paper trail.

There is also a wealth of information available on ZIO, including information on the funds available within the plan, their risk ratings and current fund prices. You can also access all the relevant forms and literature that has been produced by ZIO.

Plan administrators

ZIO enables a plan to be set up and maintained with minimal effort. Plan administrators can determine what plan members see and what they can amend. Plan administrators are able to:

- Control member access, add members and update member details
- View and monitor member usage
- Manage the plan contributions
- Access payment history
- View a summary of all their plans (if they have more than one plan set up)
- Generate reports based on individual fund performance, investment strategy and member valuations
- Produce valuation statements for the whole plan

Plan members

Easy online access allows members to view their account and update their personal details held on the system.

Plan members are also able to:

- View all the contributions the company has made plus details of all their regular and additional contributions
- Switch their existing funds
- Redirect future contributions
- Nominate or change beneficiary nominations
- Download forms and plan literature
- Download historic and current valuations in a range of international currencies

Availability

As ZIO is linked to the Isle of Man based systems, it provides real time and accurate information, when and where it's most needed. Available 24 hours a day, 7 days a week and accessible wherever internet connectivity is available.

Efficient and flexible

Functions can be enabled or disabled at all user levels for plan members and administrators. The plan can be administrated both centrally and regionally – offering the flexibility to suit your company set up and requirements. Plan reporting provides valuable management information – available when you need it.

Security

Data is transmitted using high standard encryption and audit security conforms to commercial regulations and accounting principles. The system uses a robust log-in process, which requires a password and personal identification number for added security.

For further details

To see ZIO in action, please contact your relevant financial professional. Once your plan is established, access to the system couldn't be simpler. We'll issue you with a secure password and ID, enabling your plan administrator to set user-level access as appropriate to your plan members.

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