



# Getting Started Guide



## How to access the site

To enter the Client Centre, go to [www.zurichlife.ie](http://www.zurichlife.ie), select 'Secure Login' and enter your 'User Name', 'Password' and 'PIN'. Then click on 'Login' and you will be brought to the homepage of the Client Centre.

Note: For security reasons, if you leave the Client Centre idle for 10 minutes or more, you will be automatically logged out. To enter again, you will need to re-input your login details.

## On Your First Visit Only

Once you log in for the first time, you will be prompted to change your Password and PIN. You will then be directed to the Terms and Conditions for use of the site. To continue, you must read and accept the Terms and Conditions. You will not be directed to these pages on subsequent visits.

## Main features

The Main Features of the Client Centre are:

- Make policy enquiries
- View policy values
- View group documentation (for group policies)
- Product information
- & much more...

## Where do I find Information in the Client Centre?

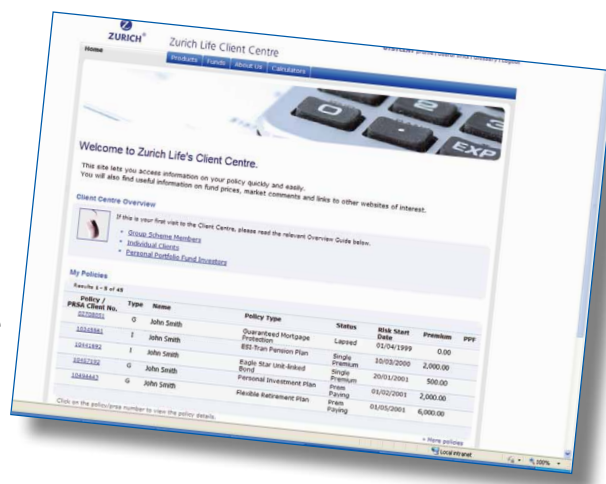
### Policy Information

Policy information is accessed quickly and easily through the homepage. You will be able to view basic information on your first 5 policies on the homepage. If you have more than 5 policies with us clicking 'my policies' at the bottom of the page will give you a complete list. For group policies you will also find information about your scheme by clicking on 'my groups'.

### Other Information

All other information is found using the buttons across the top of the screen including:

- **Products** – Details on the products we offer.
- **Funds** – Daily fund prices, fund growth calculator, investment news and asset splits.



Policy / PMSA Client No.	Type	Name	Policy Type	Status	Risk Start Date	Premium	PPV
10000000	G	John Smith	Guaranteed Mortgage Protection	Lapsed	01/04/1999	0.00	
10000001	I	John Smith	BPS-Risk Pension Plan				
10000002	I	John Smith	Ready-Star 1000-Indexed Plan	Single Premium	10/05/2000	2,000.00	
10000003	G	John Smith	Personal Investment Plan	From Premium	20/01/2001	500.00	
10000004	G	John Smith	Flexible Retirement Plan	From Premium	01/02/2001	2,000.00	
10000005	G	John Smith	Flexible Retirement Plan	From Premium	01/05/2001	6,000.00	

# Frequently asked questions about the Client Centre

## Can I change my User Name?

Your User Name is allocated to you by Zurich Life and you cannot change it.

## Can I change my Password or PIN?

Yes. The first time you login you will be required to change both your Password and PIN. After that you can change this information at any stage in the MY PROFILE section. Remember, your Password and PIN are confidential and you should not write them down or give them to anyone else.

## When happens if I forget my login details or if I enter incorrect login details and get locked out of the site?

If you have forgotten your login details or are locked out of the site you can contact our Customer Services Department by email at [customerservices@zurich.ie](mailto:customerservices@zurich.ie) or by phone on 01 7992711.

## Can I view the Client Centre through my browser?

The Client Centre is best viewed with Internet Explorer (version 7.0 or above) or Firefox (version 3.0 or above). You can check your browser against our minimum systems requirements by clicking on the 'Minimum Systems Requirements' link at the bottom of any page and selecting the option 'check your browser here.'

## When is the Client Centre available?

The Client Centre is normally available from 8.00am - 19.00pm and 19.45pm - midnight, Monday to Friday. An up to date notice of availability is posted to the Secure Login page.

## If I have any general questions or problems, who should I contact?

Any questions or problems should be directed to your financial advisor or the Zurich Life Customer Services Department by email at [customerservices@zurich.com](mailto:customerservices@zurich.com) or by phone on 01 7992711.

## More information

More information can be found on the Life public website at [www.zurichlife.ie](http://www.zurichlife.ie)

### The Main Features of this Website are:

- Daily fund prices
- Fund growth calculator
- Annualised Performance
- In-depth product and fund descriptions
- Regular investment updates
- & much more ...

