

Your Zurich Personal Retirement Plan yearly statement

Simon Cole

Plan number	P10369-069-DK/002	Planned retirement date (and age)	17 August 2030 (75 years)
Plan start date	1 December 1984	Statement date	7 October 2022
Plan anniversary date	1 December 2022	Statement period	8 October 2021 to 7 October 2022



Plan summary – 7 October 2022

Plan value £6,724.68

Transfer value £6,724.68

Please refer to your previous statement for last year's values.

Values can go down as well as up and are not guaranteed.

Zurich My Plans is a great way to keep track of your plan value online. If you haven't already, sign up at zurich.co.uk/my-pension-plan.

Gross payments received in statement period £0.00

For details of charges, please see the 'Charges on your pension plan' section later on in your statement.

Have you checked your plan?

Your plan is small and you are not making payments which means it's difficult for your investment to grow – ongoing charges mean it may even fall in value over time. It's important to review your retirement savings regularly to make sure you're on track to meet your retirement objectives. If you've previously taken benefits from your plan and your circumstances or retirement plans have changed, you'll probably want to review your retirement options, your choice of pension product and fund choices.

To help you understand the options available to you, we recommend getting guidance from moneyhelper.org.uk/pensionwise or seeking advice from a regulated financial adviser. If you don't have an adviser then give us a call to talk through your options. You'll also find plenty of information to help you at zurich.co.uk/retirement.

Don't let a scammer enjoy your retirement

Find out how pension scams work, how to avoid them and what to do if you suspect a scam by accessing The Pensions Regulator's leaflet at zurich.io/TPR-scams-leaflet



Need more help or information?

Please speak to your adviser or contact us directly.

Call us on
0370 241 6950
 Monday to Friday
 8.30am to 6.30pm, Saturday
 9.30am to 12.30pm
 (except bank holidays).
 We may record or monitor calls to improve our service.

Email us at
customerwebservice@uk.zurich.com

Write to us at
 Zurich Customer Services
 Unity Place
 1 Carfax Close
 Swindon
 SN1 1AP

Visit us at
zurich.co.uk/mystatement