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Accuracy is Everything when it comes to Service
DALBAR Announces Top 3 Mutual Fund, Insurance & Annuity Service Providers

(Boston, MA. May 18, 2016) According to the recently released DALBAR study “Meeting the Needs of High Net Worth Investors”, what matters most to wealthy investors when calling a financial services firm is:

	Very Important
An accurate response	90.8%
Answers to ALL their questions	80.0%
A thorough response	76.9%

So ... which firms are the best at delivering on those expectations?

Per DALBAR’s first quarter results from its Service Monitoring Programs, the following are the Top 3 firms across mutual funds, annuities and insurance to consistently provide accurate, thorough responses and to ensure no questions remain before ending the call:

Mutual Fund Investors	Annuity Contract Holders	Insurance Policyholders
1. Voya	1. Prudential	1. Guardian for disability insurance
2. Goldman	2. AXA	2. Western & Southern
3. JP Morgan	3. AIG	3. Prudential

The DALBAR study also found that over 60% of wealthy investors switch their service providers if the service is sub-par, underscoring that these elite service providers clearly recognize the importance of providing a superior standard of care to the bottom line.

“These firms understand that in order to truly deliver a superior standard of care they must conduct themselves with a high degree of professionalism, coupled with ensuring accuracy in the information that is provided.”

DALBAR surveyed 300 investors by means of an online questionnaire geared toward gauging current customer service interactions and preferences. Respondents surveyed owned, on average, 3.4 investment products. Wealthy investors, defined as those with more than half a million dollars in investable assets, were oversampled and made up 24.4% of survey respondents.



DALBAR's Service Monitoring Programs take a systematic approach to evaluating contact centers using methods that have been developed and refined over the past two decades. Credit is earned for elements that impact a customer's ability to act prudently on the information they receive from their financial firm.

For more information on DALBAR's study, Meeting the Needs of the High Net Worth Investor or the DALBAR Service Monitoring Programs and Rankings, please contact Brooke Halloran at 617-624-7273 or bhalloran@dalbar.com.

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