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Three Firms Lead the Industry in Customer Service to Financial Professionals

DALBAR's Financial Intermediary Service Award Winners Provide Knowledgeable Professional Support

(Marlborough, MA, 1/25/22) DALBAR congratulates the winners of the [2021 Financial Intermediary Service Award](#) celebrating those financial services organizations providing industry-leading support to the financial professional community. This award looks specifically at the overall quality of telephone support on existing business provided to financial professionals and their staff. Of the 18 organizations tested, only three rose to DALBAR's exacting standards to earn this distinction, they are (listed alphabetically):

- ✓ Goldman Sachs
- ✓ Pacific Life
- ✓ Park Avenue Securities



All firms serving the financial professional community are encouraged to check on their own performance, as measured by DALBAR, by visiting [award winner page](#).

DALBAR has long been working with and advocating for the financial professional community, helping them provide a superior standard of care to their clients and, in the case of this award, ensuring that they receive a superior standard of care from the companies whose products they sell. To determine which providers were delivering best-in-class service, DALBAR performed a year-long audit of actual interactions with financial professionals which were scored against comprehensive service standards and industry best practices.

DALBAR Director Brendan Yeager elaborates, "It is hard to overstate how important receiving quality support on existing business is for financial professionals. Having easy access to knowledgeable representatives and knowing that every transaction will be accurately processed means they have one less thing to worry about. Considering how frequently these financial professionals interact with service providers, having someone who is friendly and supportive makes their days more pleasant. Finally, one thing that sets the best financial service providers apart is that they value the financial professional's time, providing great service quickly and efficiently which frees them up to focus on building relationships and better serving their clients."

[DALBAR, Inc.](#) has a 45-year history and is recognized by industry and government as an independent third-party expert in the business of providing audits, evaluations, ratings, and due diligence. DALBAR certifications are recognized as a mark of excellence in the financial services community.