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Want Great Customer Service? These Mutual Fund Companies Have It!

These 7 Firms Overcame Industry-Wide Challenges to Beat the Odds and Earn a DALBAR Service Award

DALBAR, Inc., the nation's leading evaluator of customer service in the financial services industry, today congratulates the winners of the [2021 Mutual Fund Service Award](#). This award recognizes providers for consistently providing industry-leading telephone support to mutual fund shareholders. Of all the mutual fund companies reviewed, only the following 7 organizations earned this distinction in 2021:

- ✓ JPMorgan Funds
- ✓ New York Life Investments
- ✓ Primerica
- ✓ Putnam Investments
- ✓ Thrivent Mutual Funds
- ✓ Voya Investment Management
- ✓ Voya 529 Plans



DALBAR Director Brendan Yeager explains the significance of this year's win, "2021 has been a very challenging year for contact centers. We are in the midst of an unprecedented staffing shortage, which has hit phone centers particularly hard. To earn a DALBAR Service Award in the best of times is a real achievement, but to do so under such difficult circumstances is really something special. By focusing on the customer and the important role representatives play in helping shareholders meet their financial goals, this year's winners have built resiliency. This *meet-the-customers-needs-at-all-costs* attitude has allowed these companies to do amazing things."

DALBAR invites all firms to check on their performance, as measured by DALBAR, by visiting their [award winner page](#).

The winners of the DALBAR Service Awards are determined by an audit of actual customer experiences over the course of the year. Representative performance is evaluated against superior service standards and industry best practices. The expert evaluation of hundreds of real calls throughout the year provides the most reliable measure of customer service excellence that exists in the market. To earn this distinction, companies need to exceed a high bar across all facets of the shareholder experience.

[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.

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