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DALBAR'S BEST OF THE BEST IN INVESTOR STATEMENTS IN 2016

(Boston, MA. January 11, 2017) DALBAR has identified **Merrill Lynch, BlackRock, Bank of America Merrill Lynch, Prudential, MassMutual and AIG** as the #1 ranked statements in each of their respective peer groups. DALBAR's 19th annual Trends and Best Practices in Investor Statements Report evaluated nearly 100 investor statements for clarity, content and design. The statements from the Brokerage, Mutual Fund, Retirement and Variable Annuity were evaluated.

Only 23% of statements evaluated earned an "Excellent" designation from DALBAR. For the first time since 2013, an annuity firm (AIG) earned a "Very Good" designation for its industry-leading annuity statement. The race to be the best was as competitive as ever in 2016. Within the brokerage industry, the margin between 1st place and 4th place was once again razor thin.

"The investor statement is important to investors. Clear, meaningful information facilitates better decision-making. The commitment these firms have put forth to provide industry-leading statements is a testament to their desire to put investors' interests first." said Cory Clark, Director of Research and Due Diligence at DALBAR.

DALBAR has spent the last two decades evaluating and benchmarking investor statements. DALBAR's evaluation examines whether statements include features that strongly impact an investor's ability to access and understand important information as well as whether they include all of the primary and secondary content needed by the investor. Last but not least, the design elements that positively and negatively affect the overall appearance and communication effectiveness are evaluated. Each year, DALBAR identifies which investor statements provide the best experience from the investor's perspective.

For more information on DALBAR's 19th Annual Trends & Best Practices, please contact Brooke Halloran at 617-624-7273 or at bhalloran@dalbar.com.

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