

## Putnam Investments Receives DALBAR's Total Client Experience Award

### *Investment Management Firm Honored with Award for 12<sup>th</sup> Straight Year*

(Marlborough, MA, 2/22/2023) DALBAR is delighted to announce that Putnam Investments has received the **Total Client Experience Award** for 2022. This award recognizes Putnam for providing clients with exceptional support through telephone interactions, subsequent processing and any necessary follow-ups.

“Putnam Investments is a well-established leader in customer service, but the Total Client Experience Award speaks to an even greater breadth of excellence. Putnam provides award winning service on the phone, and then services the client in an industry-leading fashion behind the scenes.” remarked Cory Clark, Chief Marketing Officer at DALBAR, Inc.

To earn the Total Client Experience Award, firms must engage in a thorough audit of their telephone service, exceeding rigorous benchmarks in criteria that covers all aspects of the customer experience, including:

- ✓ Authenticating callers properly to protect their privacy and assets
- ✓ Engaging shareholders through friendly, personable interactions
- ✓ Effective communication
- ✓ Providing complete and accurate account details to ensure that shareholders can engage in informed decision making
- ✓ Completing all transactions accurately according to shareholder instructions

DALBAR awards are recognized in the financial community as the standard of excellence. DALBAR is an independent third-party expert, providing audits, evaluations, ratings, and due diligence. DALBAR certifications are the mark of excellence in the financial services community.

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