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DALBAR Reveals Variable Annuity Statements that Exceed Expectations

(Marlborough, MA., May 7, 2024) DALBAR, the authority on financial services communications quality, unveiled the results of its 26-year annual review of account statements, crowning Corebridge Financial, Lincoln Financial and Jackson National Life Insurance Company® (Jackson®) as the standard bearers for variable annuity statements.

Reigning supreme for 22 years, **Corebridge Financial** topped the list again by demystifying annuity statements with clear definitions and footnotes about contract values and benefits, all presented in an easy-to-understand format.

Lincoln Financial's statement garners an impressive 2nd place spot with a clean appearance, color, and intuitive illustrations of income base amounts and projected income.

Jackson earns its place among variable annuity statement royalty, receiving their highest score ever, for providing detailed benefit and withdrawal values and a helpful glossary of annuity terms.

These firms excel in their presentation of contract details which results in greater investor understanding and ability to make informed decisions.

This year's review found a surge in firms utilizing QR codes on statements to encourage online registration and e-delivery. This rise in QR codes and continued prevalence of URLs reflect a growing recognition of the powerful synergy between paper statements and the digital experience.

DALBAR's *Trends & Best Practices in Investor Statements* is an annual publication ranking statements across variable annuity, brokerage, mutual fund and retirement accounts, analyzing both the level of detail offered and the overall presentation of account information.

[DALBAR, Inc.](#) has a 48-year history and is recognized by the financial services 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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