

FOR IMMEDIATE RELEASE

Contact: Kathleen Whalen
617.723.6400
KWhalen@DALBAR.com

DALBAR Announces Its 2012 Mutual Fund Service Award Winners in Financial Services

(Boston, MA. December 10, 2012) Today DALBAR released the 2012 winners of its annual Mutual Fund Service Award. **BlackRock, DWS Investments, JPMorgan Funds, Lord Abbett, Mainstay Investments, Primerica, Putnam Investments and Transamerica Funds** emerged as the leaders in customer service in 2012.

For over two decades, DALBAR has conducted rigorous testing of service delivery and, each year identifies those mutual fund firms that were found to be above their peers in service to clients after a full year of comprehensive evaluation.

Important service attributes that dramatically and clearly differentiate these firms from the industry at large include:

- When an investor contacts their call centers, the personnel demonstrate an immediate understanding of the importance of the relationship and a high degree of professionalism 90% of the time. This compares to an industry average of 55%.
- These firms excel at ensuring all information provided is understood and expectations are set as to what the next steps are for each client. This is demonstrated more than 85% of the time compared to the industry average of 52%.
- Consistency in delivering at a superior level. This award was first introduced 23 years ago and Putnam Investments has earned it 21 times, BlackRock and Transamerica, 13 times, JP Morgan Funds and Mainstay Investments, 12 times, Lord Abbett and Primerica, 10 times and DWS Investments has earned it 4 times.

"These firms deserve special congratulations for an unwavering commitment to excellence since they are continuously faced with the overwhelming challenge of an ever changing economic landscape," said Kathleen Whalen, Managing Director at DALBAR.

The Mutual Fund Service Award is based on systematic testing of customer service throughout the year. DALBAR conducts thousands of tests to measure how financial companies respond to the need for service from their customers. Companies that exceed a variety of industry benchmarks after one year of testing earn the DALBAR Mutual Fund Service Award.

DALBAR, Inc., the nation's leading financial services market research and consulting firm, is committed to raising the standards of excellence in the financial services industry. With offices in both the US and Canada, DALBAR develops standards for, and provides research, ratings, and rankings of intangible factors to the mutual fund,

broker/dealer, life insurance, property and casualty, and managed account industries. Measurements include investor behavior, customer satisfaction, service quality, communications, Internet services, and financial professional ratings.

###