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Waddell & Reed earns DALBAR Recognition for Excellence Award

(Boston, MA. March 4, 2014) DALBAR, Inc. announced today that Waddell & Reed earned [Recognition for Excellence](#) for its exceptional customer service provided to investors and financial advisors. This is the fourth consecutive year that Waddell & Reed has achieved this level of excellence in serving the needs of both investors and financial professionals.

Over the span of an entire year DALBAR conducted rigorous testing of the call center service that Waddell & Reed provided to both investors and financial advisors and found Waddell & Reed to outperform their peers in the high quality and consistency of service provided.

DALBAR found the service Waddell & Reed provided to be superior to the industry at large, particularly in the following areas:

- Waddell & Reed understands that first impressions are powerful and will set the stage for the rest of the call. Representatives at Waddell & Reed set themselves apart by greeting financial professionals and investors with the highest degree of respect over 90% of the time.
- Waddell & Reed representatives understand that often times a conversation can require a very detailed answer regarding a particular account or, as is often the case with financial professionals, several account(s). Waddell & Reed representatives are highly adept at re-capping important information discussed in the call more than 92% of the time.

"Through continuous monitoring and evaluation of service delivery, Waddell & Reed has, for the fourth consecutive year, achieved a level of excellence in servicing the needs of both financial professionals and investors," said Kathleen Whalen, Managing Director at DALBAR. She added, "Waddell & Reed understands that consistently displaying a high level of professionalism and knowledge of their products and services is of paramount importance in earning customer loyalty and creating strong customer advocates, and they had the track record to prove it."

"Earning the DALBAR award for four consecutive years confirms that our Call Center is one of the best in the industry," said Kelly Curfman, Director of Client Services. "We are quite proud of our Client Service Representatives' diligence and dedication to each and every caller."

DALBAR, Inc. is the financial community's leading independent expert for evaluating, auditing and rating business practices, customer performance, product quality and service. Launched in 1976, DALBAR has earned the recognition for consistent and unbiased evaluations of insurance companies, investment companies, registered investment advisers, broker/dealers, retirement plan providers and financial professionals. DALBAR awards are recognized as marks of excellence in the financial community.