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The Newport Group and Principal Financial Web Sites make “How am I Doing?” Center Stage for Investors according to the DALBAR Retirement Plan Web Site Leadership Report

(Boston, MA. June 3, 2014) DALBAR, Inc. announced today the release of its evaluation of financial services firms retirement plan websites. This evaluation included an in-depth study and review of a total of 52 Retirement Plan Participant Web sites.

Showing employees where they stand on the journey to retirement should be the overriding focus of every retirement plan participant web site. Unfortunately, this central theme is often relegated to some obscure location, tucked away behind the curtain of security. Operational tools, disclosures, fear of making misleading statements, arcane language and decision making tools have pushed the key question, “How Am I Doing?” off the center stage.

However, two financial services firms emerged as the clear leaders in putting “How Am I Doing” up front and center:

- The Newport Group: has an entire section of their web site that enables the investor to track their account called “My Forecast.” It is very interactive with sliders and drop down fields which allow the user to easily play with their results to see how they can improve their overall outcome. In addition, Newport Group lists a summary of the “My Forecast” area on a dashboard which is the first thing investors see after they log in.
- Principal Financial: the first thing the investor sees when logging in is information on the account and a “Track your Progress” section that shows the history of the account along with a tool “Will You be Ready to Retire” to help guide the investor in reaching their retirement funding goals.

“These firms recognize that investors benefit greatly from the “How Am I Doing?” theme by receiving encouragement to remain on track and avoid a disturbing danger signal.” said Kathleen Whalen, Managing Director of DALBAR. She added, “Being on track also reduces the likelihood that active investors will act irrationally during market gyrations...buying high and selling low. Such irrational actions can cost participants as much as half of their retirement income.”

The Web sites were evaluated using DALBAR’s DC WebMonitor program criteria. DALBAR evaluates defined contribution Web sites on a quarterly basis. Web sites are scored on a 100-point scale in several criteria, which are grouped into five broad categories: Functions, Usability, Content Currency, Consistency, and Behavior Centric.

For more information on DALBAR's DC WebMonitor Program, please visit the web site at www.dalbar.com or contact Erin Batog at 617-624-7273 or ebatog@dalbar.com.

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