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DALBAR Announces Its 2015 Mutual Fund Service Award Winners

(Boston, MA. December 8, 2015) Today DALBAR released the 2015 winners of its annual Mutual Fund Service Award. **BlackRock, Deutsche Asset & Wealth Management, JPMorgan Funds, MainStay Investments, Primerica, Putnam Investments** and **Voya** emerged as the superior service providers in customer service in 2015.

For nearly three decades, DALBAR has conducted rigorous testing of service delivery via its Service Quality Measurement Programs. Each year, DALBAR identifies those mutual fund firms that rise above their peers in service to clients after a full year of comprehensive evaluation and recognizes these elite institutions with the DALBAR Service Award.

These firms have proven to be elite service providers and set themselves apart from the industry at large. DALBAR's rigorous testing of service delivery found that, collectively, these firms demonstrated the following critically important service attributes more than 90% of the time:

- Representatives always make a strong, positive first impression thanks to their high degree of professionalism.
- The proactive management of customer calls by these award winning representatives ensures that investors are kept fully informed and educated about what expectations and next steps to anticipate when making any changes to their accounts, whether that is updating the address or moving money between their various accounts.
- Call Center Personnel excel at active listening and posing the right questions to ensure information provided is pertinent and tailored to each and every personal situation.

"The DALBAR Mutual Fund Service Award represents the best of the best in financial services, reflecting great commitment, thought leadership and acumen," said Kathleen Whalen, Managing Director at DALBAR.

The DALBAR 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 service needs of their customers. Companies that exceed the award level benchmarks after one year of testing earn the DALBAR Mutual Fund Service Award. To learn more about the Service Award and the Service Quality Measurement Programs, contact Brooke Halloran at 617-624-7273 or bhalloran@dalbar.com.



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 the marks of excellence in the financial community.

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