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What Do Investors Want...R-E-S-P-E-C-T DALBAR Finds JP Morgan, Prudential & Guardian Deliver

(Boston, MA. July 26, 2016) According to a recent DALBAR Study on meeting the needs of wealthy investors, the things that really have a negative impact on their overall customer service experience, and make them consider moving their money, is when a representative “does not listen, is disinterested and rushes me off the phone.” These were the top ranked customer service detractors according to the study.

So ... which firms go out of their way to listen and “find out what it means to their investors?”

Per DALBAR’s first quarter results from its Service Monitoring Programs, the Top 3 firms across mutual funds, annuities and insurance to consistently listen carefully to requests, show genuine interest in wanting to help address the requests and take the time to ensure all needs are taken care of include:

Mutual Fund Investors	Annuity Contract Holders	Insurance Policyholders
1. JP Morgan	1. Prudential	1. Guardian for disability insurance
2. Primerica	2. AXA	2. Western & Southern
3. BlackRock	3. AIG	3. Mass Mutual

“One of the foundations of good customer service is starting with a genuine interest in helping people and these firms take that to another level by ensuring great care is combined with attentive listening, respect and appreciation for the relationship,” said Kathleen Whalen, Managing Director at DALBAR.

DALBAR surveyed 300 investors by means of an online questionnaire geared toward gauging current customer service interactions and preferences. Respondents surveyed owned, on average, 3.4 investment products. Wealthy investors, defined as those with more than half a million dollars in investable assets, were oversampled and made up 24.4% of survey respondents.

DALBAR’s Service Monitoring Programs take a systematic approach to evaluating contact centers using methods that have been developed and refined over the past two decades. Credit is earned for elements that impact a customer’s ability to act prudently on the information they receive from their financial firm.



For more information on DALBAR's study, Meeting the Needs of the High Net Worth Investor or the DALBAR Service Monitoring Programs and Rankings, please contact Brooke Halloran at 617-624-7273 or bhalloran@dalbar.com.

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