

For Immediate Release

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DALBAR Survey Finds Investors Want the Answer to “How Did MY Account Do?”

(Boston, MA. July 16, 2014) DALBAR, Inc. announced today the release of its national study of what investors find important and want to see most on the statement they receive from their financial services company.

DALBAR conducted a survey of 372 investors over the age of 25 who have an income of at least \$50,000 and investment portfolios worth more than \$100,000. They placed a high degree of importance on seeing their personal rate of return. In fact, 50% of investors with \$1,000,000 in assets considered overall rate of return **“Critically Important”** and 37% rated it **“Important.”**

As a shocking contrast only 25% of statements across the mutual fund, annuity and brokerage industry actually include personal rate of return, according to the annual *DALBAR Trends and Best Practices in Investor Statement Study* produced earlier this year.

“The most important question an investor has is whether or not their account has produced a sufficient return and if they are on track to achieving their financial goals” said Kathleen Whalen, Managing Director at DALBAR. She added, “Their trust and confidence is being compromised when that figure is a mystery.”

The Investor Statement Preferences study is one of four reports included in the DALBAR Statement Strategies Package. For more information on DALBAR’S Investor Statement Preferences study or on Statement Strategies, please contact Brooke Halloran at 617-624-7273 or bhalloran@dalbar.com or visit the web site at www.dalbar.com.

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