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DALBAR APPOINTS CHIEF MARKETING OFFICER

(Marlborough, MA. November 15, 2018) DALBAR, Inc., a leading expert in the financial services industry, today announced that Cory Clark has been appointed Chief Marketing Officer. As CMO, Cory will focus on applying industry best practices to achieve more effective customer experience, regulatory compliance, data security and lower costs.

“I am confident that as our ambassador, Cory will expand the use of today’s best practices as well as new practices that continue to evolve,” said Louis S. Harvey, DALBAR’s CEO. “His goal will be to give a competitive business advantage to DALBAR’s clients.”

With more than a decade of experience working with DALBAR clients to optimize their communications, compliance and business practices, Cory will bring best practice solutions to all areas of financial services firms. Cory is a 12 year veteran of DALBAR, most recently serving as Director of its Research and Due Diligence division where he worked with retirement plan specialists, investment managers, advisors, broker/dealers and insurance companies in a variety of roles.

“I’m thrilled to take on this new role and its attendant challenges,” said Clark. “As CMO, my focus will be to ensure the industry continues to make effective use of the best practices we provide, and in a manner that supports firms’ evolving business goals in our rapidly changing industry.”

Cory holds a bachelor’s degree in Economics from the University of Massachusetts, Amherst as well as a law degree from New England Law | Boston.

About DALBAR, Inc.

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 investment companies, registered investment advisers, insurance companies, broker/dealers, retirement plan providers and financial professionals. DALBAR awards are recognized as marks of a superior standard of care in the financial community.