

## 3 Firms Stand Out for Highest Quality Phone Service to Financial Professionals

### 2022 Financial Intermediary Service Award Winners Announced by DALBAR

(Marlborough, MA, 2/1/2023) The winners of DALBAR's 2022 Financial Intermediary Service Award, recognizing firms for delivering extraordinary telephone support to financial advisors, agents and other intermediaries, have been announced. Financial intermediaries are a particularly demanding audience to serve effectively due to an increased knowledge base and transactional requirements. Three firms stood out from the crowd, continually providing stellar service that was rigorously evaluated against industry best practices throughout the year by DALBAR.

The 2022 winners were:

- Goldman Sachs
- Pacific Life
- Park Avenue Securities

"In many industries, customer service is about the consumer, and that's the end of the story. For Financial Services firms, the consumer is only half the story. A vital network of intermediaries needs to be serviced with a vastly different service model. Financial intermediaries know what great customer service looks like in this space, and they expect it, to allow them to service their clients effectively. Therefore, the firms recognized here today should be applauded not only for the service they provide intermediaries directly, but also for how that service trickles down to benefit the investor," observed Cory Clark, Chief Marketing Officer at DALBAR, Inc.

DALBAR's extensive work and advocacy for the financial professional community helps them provide a superior standard of care to their clients and, in the case of this award, ensures that they receive a superior standard of care from the firms whose products they sell. To determine which providers are delivering best-in-class service, DALBAR performed a year-long audit of actual interactions with financial professionals which were scored against comprehensive service standards and industry best practices. To earn recognition, firms must perform at a high level measured by criteria looking at all aspects of the service experience.

DALBAR is an independent third-party expert, providing audits, evaluations, ratings, and due diligence. DALBAR certifications are the mark of excellence in the financial services community.

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