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DALBAR Announces Its 2016 Mutual Fund Service Award Winners

(Boston, MA. December 14, 2016) DALBAR identifies the mutual fund providers leading the industry when it comes to shareholder service. **BlackRock, Deutsche Asset Management, JPMorgan Funds, MainStay Investments, Primerica, Putnam Investments, Voya Investment Management** and **Voya's 529** line were recognized as service leaders for 2016 and earned DALBAR's prestigious Mutual Fund Service Award.

DALBAR has been evaluating and benchmarking interactions between mutual fund providers and their shareholders for the last three decades. Each year, DALBAR identifies those firms that rise above their peers in the level of service provided. After a full year of comprehensive evaluation, DALBAR recognizes elite institutions with the Mutual Fund Service Award.

According to DALBAR Director Brendan Yeager, "Today's shareholder is more demanding than ever, they want to deal with companies that treat them right. We are also seeing barriers to moving money between companies, most notably back-end sales charges, being removed. As a result, service is taking on a bigger role as a key differentiator for consumers. These award winners recognize the importance of delivering a superior standard of care and have made a clear institutional commitment to the customer experience."

DALBAR's Mutual Fund Service Award was earned through an objective third-party evaluation of the quality of support being provided to mutual fund shareholders. DALBAR randomly selected and audited incoming telephone calls in order to monitor the customer experience. To qualify for the Award, companies were required to exceed stringent standards covering all aspects of the shareholder interaction. Specific areas where these firms stood out include: taking a proactive approach to the call, building a rapport with shareholders, verifying key information, and detailing the service options available to customers. For more information on the Mutual Fund Service Award or the Performance Evaluation of Mutual Fund Service Program, please contact Brooke Halloran at 617-624-7273 or at 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 a reputation 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 excellence in the financial community.