

Leading Plan Participant Web Sites Recognized in DALBAR's Quarter 1 Web Rankings

(Boston, MA - May 2009) Charles Schwab's newly renamed retirement arm, Schwab Retirement Plan Services Company, earned the top spot in the DC WebMonitor Plan Participant rankings for Quarter 1-2009. Schwab Retirement Plan Services, along with Transamerica, Merrill Lynch and Principal Financial, earned a DALBAR designation of "Excellent".

Category Leaders

The ability to 'act' on one's account is what set Schwab Retirement Plan Services' site apart from the rest. The range of available account management capabilities gave the firm the lead in Functionality as well as the top overall score. In second place, Transamerica's simple, common sense layout combined with clear, plain language labeling and a host of support features, put its site in the top position for the Usability and Behavior Centric categories. Merrill Lynch, featured in the report's 'Leader Focus', rated second for both Functionality and Usability.

Quarterly Leadership Reports

DALBAR's DC WebMonitor Plan Participant Leadership Reports highlight characteristics that elevate participant sites to the status of 'industry leader'. Insightful E-ERISA Commentaries address current hot topics in the retirement world and quarterly analysis highlights best practices with respect to current online offerings. This quarter's industry analysis, entitled 'Capturing Rollovers' looks at four firms that perform well with respect to this immense asset gathering opportunity.

First Quarter Rankings - Defined Contribution - Plan Participant Sites, 2009:

Web Ranking	Firm
# 1	Schwab Retirement Plan Services
# 2	Transamerica
# 3	Merrill Lynch
# 4	Principal Financial
# 5	Prudential Financial

About DC WebMonitor

DALBAR's DC WebMonitor offers Defined Contribution plan service providers up-to-date and critical information regarding the Web presence of retirement industry firms. Highlights of the program include quarterly rankings, e-mailed industry updates as well as access to an online database of industry intelligence.

About DALBAR

DALBAR, Inc., the nation's leading financial-services market research firm, is committed to

raising the standards of excellence in the financial-services industry. With offices in both the US and Canada, DALBAR develops standards for, and provides research, ratings, and rankings of intangible factors to the retirement, mutual fund, broker/dealer, discount brokerage, life insurance, and banking industries. They include investor behavior, customer satisfaction, service quality, communications, Internet services, and financial-professional ratings.

For additional information about DALBAR's Quarterly Leadership Reports or DC WebMonitor, please contact:

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