

Leading Plan Participant Web Sites Recognized by DALBAR's DC WebMonitor

(Boston, MA. - August 2009) Schwab Retirement Plan Services maintained its position at the top of DALBAR's *DC WebMonitor* Plan Participant ranking for the second quarter of 2009. Second, Third, Fourth and Fifth place went to Merrill Lynch, Transamerica, Prudential Financial and Fidelity, respectively. In a departure from previous quarters, every site in the top five achieved a DALBAR designation of "Excellent".

Category Leaders

Schwab Retirement Plan Services' 2nd straight reign at the top can be directly linked to its focus on **site functionality**. The site consistently bests its competition by offering extensive account information and allowing for a breadth of transactions to be completed onsite. Both Prudential and Merrill Lynch fall closely behind Schwab Retirement Plan Services with respect to site functionality. As it pertains to **site usability** Merrill Lynch and Transamerica are virtually tied for the highest scores, a focus that has kept both firms within the top five for the last three quarters.

Leadership Report-Quarter 2-2009

In addition to the Web site ranking, DALBAR's *Q2-2009 Defined Contribution Plan Participant Leadership Report* features an insightful E-ERISA Commentary directly applicable to plan participant sites. The report also highlights firms that have taken steps to help participants regroup and get back on track in developing a realistic retirement strategy in light of recent economic events. Hewitt Associates and T. Rowe Price are featured in the report's "Leader Focus" which documents industry leading Web sites and site-specific features utilized by those firms to capitalize on the online environment.

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

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

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, Inc.

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, contact:

Courtney O'Leary-Lima
DALBAR, Inc.
617-624-7285
coleary@dalbar.com

<http://www.dalbar.com>