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DALBAR Invites Financial Firms to Submit Investor Statements for Annual Ranking Program

(Boston, MA. August 10, 2009) Do you believe your firm produces cutting-edge investor statements for your clients? If so, why not turn "cutting-edge" into "award-winning" and promote your firm's commitment to high-quality investor communications?

DALBAR, Inc. is now accepting submissions for its annual investor statement evaluation and ranking program. Now in its 12th year, DALBAR's "Trends and Best Practices in Investor Statements" program has been updated and modified to reflect the industry's best practices, regulatory requirements, and consumer preferences. Among other factors, credit is awarded for:

- Effective display of account information through creatively designed summaries and graphics
- High-quality, effective messaging that motivates positive behavior among investors
- Overall design and layout
- Alternative formats, such as electronic delivery, Braille, and foreign languages

As part of its Trends and Best Practices Program, DALBAR produces comprehensive reports ranking statements, spotlighting the industry's best, and summarizing practices that drive positive investor behavior. Reports are produced for each of the following channels:

- Brokerage
- Mutual funds
- Variable annuity
- Defined contribution retirement plan
- Defined benefit retirement plan
- Total retirement plan (combined DC and DB statement)

For more information on how to submit your firm's statements or order one of the reports, please call 1-800-296-7056 or visit research.dalbar.com.

DALBAR, Inc., the nation's leading financial-services market research firm, continues its three-decade commitment to raising the standards of excellence in the industry. With offices in the U.S. and Canada, DALBAR develops standards for, and provides research, ratings, and rankings of, intangible factors that influence the overall customer-service experience in the mutual fund, broker/dealer, managed account, retirement plan, life insurance, and property and casualty insurance industries; such factors include print communications, Internet, interactive voice response, call center, and financial-professional touch points. www.dalbar.com.

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