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How Does Your Investor Statement Measure Up to the Competition? DALBAR Invites Financial Firms to Submit Statements for Annual Ranking Program

Boston, MA (June 24, 2010) – 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 13th year, DALBAR’s “Trends and Best Practices in Investor Statements” program evaluates statements in relation to customer statement preferences, the industry’s best practices, regulatory requirements, and technological advancements.

The result of the analysis is a series of comprehensive reports ranking statements, spotlighting the industry’s best, and summarizing practices that drive positive investor behavior. Rankings and 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 to 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, the many factors that influence the overall customer-service experience in the financial services and, now, health care industries; such factors include print communications, Internet, interactive voice response, call center, and financial-professional touch points. www.dalbar.com.

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