

Contact: Kathleen Whalen  
617-723-6400  
[kwhalen@dalbar.com](mailto:kwhalen@dalbar.com)

## DALBAR Releases Evaluation of Private Client Statements Two Firms Excel in Making the Complex Approachable

(Boston, MA. - April 15<sup>th</sup>, 2010) DALBAR, Inc. announced today the release of its first-ever review and evaluation of statements designed to serve the needs of the nation's wealthiest investors and the advisers who work with them.

In *Private Client Statements: An Overview of Trends & Best Practices*, Merrill Lynch and Fidelity emerged as leaders in the industry, with statements that demonstrate a commitment to producing high-quality communications through information design best practice.

"Private client statements are typically quite lengthy and oftentimes nearly incomprehensible," said Kathleen Whalen, Managing Director at DALBAR. "However, just like other investors, high-net-worth individuals demand communications materials that provide quick, at-a-glance answers to the most pressing questions supported by pertinent details - all presented in a manner that is calculated to be understood," she added.

Merrill Lynch and Fidelity were singled out for:

- | Concise summary sections that roll up details into easily digestible information groupings
- | Graphic elements that help reinforce important points and enhance statement navigation
- | Easy access to important contact information, with appropriate descriptions of whom to contact for the various pieces of information

For more information on *Private Client Statements: An Overview of Trends & Best Practices* or on DALBAR's Private Client Statement evaluation services, please visit the web site at [www.dalbar.com](http://www.dalbar.com) or contact Brooke Halloran at 617-624-7273 or [bhalloran@dalbar.com](mailto:bhalloran@dalbar.com).

DALBAR, Inc. has been a leading third-party evaluator in the financial services industry since 1976. With offices in the U.S., Canada and London, DALBAR develops standards for -- and provides research, ratings and rankings of - the many factors that influence a firm's overall customer-service experience. Such factors include print communications, public Web sites and proprietary portals, interactive voice response units, call centers, and financial adviser services.

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