

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

## Investors: Show Me My Returns -- and Fees DALBAR releases study of Investor Statement Preferences

(Boston, MA. - May 24<sup>th</sup>, 2010) DALBAR, Inc. announced today the release of its national study of what investors expect to see in a statement from financial services companies. DALBAR's Investor Statement Preferences study identifies the importance of certain elements in investment and benefit statements. Among the findings:

- | The overall rate of return in the account is the single most important statement item, with over half of the respondents reporting this to be critically important.
- | Total fees charged was the second highest rated item investors want on their statements.
- | Sections that summarize statement details are also critical to understanding.
- | Over half of investors consider statement messages from their financial adviser to be important.

"Declining trust in financial services has pushed up demand for fee disclosure," said Kathleen Whalen, Managing Director at DALBAR. "It's clear that investors want to know what benefits they receive in the form of returns and what these benefits are costing them."

The results of this study contribute to the weighting of DALBAR's statement rating criteria, which are used to evaluate individual investment and benefit statements.

For more information on on DALBAR's Investor Statement Preferences study or on DALBAR's 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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