



2018 TRENDS & BEST PRACTICES IN PERFORMANCE REPORTING

Introduction

Performance Reporting can be a powerful vehicle in a communication program when it comes to influencing behavior among investors.

However, industry developments regularly render existing performance reporting obsolete. Institutions may seek to emerge as leaders by setting new competitive standards or may find it necessary to make changes in order to remain competitive.

Consistent improvements will lead to industry-leading reporting that:

- Supports the clients' need to examine their portfolios from a variety of perspectives
- Supports the financial advisor's need for high-quality, high-value client communications
- Increases assets under management through expanded client relationships

DALBAR's Trends & Best Practices in Performance Reporting offers valuable insight on current practices with respect to reports shared with brokerage clients and highlights best practices and unique features that are incorporated to bolster the client experience.

Benefits

Key benefits of this report include:

- ✓ A better understanding of how your firm's performance reporting compares to peer firms
- ✓ Identifying necessary enhancements to improve the design, content, quality and competitiveness of your firm's reporting documents
- ✓ Making the case internally to make changes to the reporting
- ✓ Access to best practices

About the Report

2018 Trends & Best Practices in Performance Reporting includes:

- ✓ A deep dive into what makes an industry-leading performance report:
 - How they tell the investment story
 - How they facilitate understanding of a portfolio
 - Innovative features and content that add value to the experience
- ✓ A Top 5 Ranking
- ✓ Key Findings relative to each criterion

Firms Reviewed

For this study, the following competitor pool was reviewed:

- Advent Black Diamond
- Charles Schwab
- Edward Jones
- InvestEdge
- Merrill Lynch
- Morgan Stanley
- Pershing
- Wells Fargo Advisors

Cost

The cost for *2018 Trends & Best Practices in Performance Reporting* is \$4750.

Questions?

For more information about the Trends & Best Practices in Performance Reporting, please contact Jared Licklider at jlicklider@dalbar.com