

***DALBAR Recognizes the Best Web Sites in the Mutual Fund Industry***

**T. Rowe Price & OppenheimerFunds Hold Tight to First Place;  
Emphasis on Roth IRA Conversions**

**(Boston, MA. - December 2009)** T. Rowe Price maintained the number one position in DALBAR's Mutual Fund Quarterly Ranking & Trending Report, upholding their "Excellent" designation for a 17<sup>th</sup> consecutive quarter. Other firms earning an "Excellent" designation in DALBAR's consumer rankings include Wells Fargo, OppenheimerFunds, Vanguard, Fidelity, BlackRock, Invesco Aim, Schwab and E\*Trade.

Standing alone at the top of the financial professional rankings with the only "Excellent" designation is OppenheimerFunds, who also takes first place for an impressive 15<sup>th</sup> consecutive quarter. Rounding out the top three were American Funds and Fidelity, both of which earned a "Very Good" designation.

***Third Quarter Rankings, 2009: Movers and Shakers***

Thrivent Financial's website moved up five places, taking over 5<sup>th</sup> place in the financial professional rankings. Thrivent now offers their financial professionals the option to order hard-copy literature including prospectuses, annual reports and investor guides. In addition, a good order checklist is provided in order to alert users of commonly missed items before submitting forms online.

ING climbed up the rankings seven places to fill the 14<sup>th</sup> spot on the financial professional side. ING has introduced interactive forms that can be filled out and saved online for future use. The firm also offers comprehensive product fact sheets with information including top ten holdings, investment risks, portfolio management facts, and Morningstar equity style boxes.

***Third Quarter Rankings, 2009:***

Top-ranked websites, as of the end of third quarter, 2009, are:

<b>Web Ranking</b>	<b>Consumer</b>	<b>Financial Professional</b>
<b># 1</b>	T. Rowe Price*	OppenheimerFunds*
<b># 2</b>	Wells Fargo*	American Funds
<b># 3</b>	OppenheimerFunds*	Fidelity
<b># 4</b>	Vanguard*	Putnam Investments
<b># 5</b>	Fidelity*	Thrivent Financial

\*Earns DALBAR's "Excellent" designation.

***Trend: Roth IRA Conversions***

2010 will bring some regulatory changes to Roth IRA conversions that will open up Roth IRAs to new investors. In the third quarter, many firms highlighted opportunities the regulation changes will bring, giving advisors a jump-start at capturing Roth IRA conversions.

- Pioneer Investments placed a banner advertisement on both their financial professional and consumer websites that counted down the days until 2010, serving as a constant reminder of the upcoming opportunity. Pioneer supplied both audiences with information on the regulation changes, while financial professionals received added resources, such as responses to client questions and conversion strategy guides.
- MainStay Investments prepared advisors for Roth IRA conversions with regulation overviews and talking points that come in handy when discussing a conversion with clients.
- John Hancock Funds launched an email campaign to reinforce the opportunities the changes will bring for advisors. The email campaign also reminded advisors about useful website resources, such as an advanced planning webcast on Roth IRA conversions, new white papers, and a client-approved PowerPoint presentation entitled, "Is a Roth IRA Conversion Right for You?"

The complete WebMonitor Mutual Fund quarterly updates for the Third Quarter, 2009, are available from DALBAR at [WebMonitor Quarterly Rankings](#) or 617-723-6400.

DALBAR, Inc., the nation's leading financial-services market research firm, is committed to raising the standards of excellence in the financial-services industry. With offices in both the US and Canada, DALBAR develops standards for, and provides research, ratings, and rankings of intangible factors to the mutual fund, broker/dealer, discount brokerage, life insurance, and banking industries. They include investor behavior, customer satisfaction, service quality, communications, Internet services, and financial-professional ratings.

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