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DALBAR Announces Its 2014 Mutual Fund Service Award Winners

(Boston, MA. December 10, 2014) Today DALBAR released the 2014 winners of its annual Mutual Fund Service Award. **BlackRock, Deutsche Asset & Wealth Management, JPMorgan Funds, Lord Abbett, MainStay Investments, Primerica, and Putnam Investments** emerged as the premier service providers in customer service in 2014.

For nearly three decades, DALBAR has conducted rigorous testing of service delivery via its [Service Quality Measurement Programs](#). Each year, DALBAR identifies those mutual fund firms that rise above their peers in service to clients after a full year of comprehensive evaluation and recognizes these elite institutions with the DALBAR Service Award.

These winners understand the importance of delivering superior service as can be seen from the evaluation results:

- Investors were made to feel important and valued in 90% of the conversations with representatives from the award winning organizations. In contrast, only 77% of the representatives in the rest of the mutual fund industry demonstrated these important service characteristics.
- Representatives from the winning firms understand that often times a conversation can require a very detailed answer and they are highly adept at re-capping important information discussed in the call more than 89% of the time as compared to the rest of the industry at 77%.
- The high quality of service delivered by the winners never wavers. This award was first introduced 25 years ago and Putnam Investments has earned it 23 times, BlackRock 15 times, JP Morgan Funds and MainStay Investments 14 times, Lord Abbett and Primerica 12 times and Deutsche Asset & Wealth Management (formerly DWS Investments) has earned it 6 times.

"The level of service performance achieved by these companies sets extremely high standards for their competitors and in doing so improves the service levels to customers across the industry as a whole," said Kathleen Whalen, Managing Director at DALBAR.

The DALBAR Service Award is based on systematic testing of customer service throughout the year. DALBAR conducts thousands of tests to measure how financial companies respond to the service needs of their customers. Companies that exceed the award level benchmarks after one year of testing earn the DALBAR Mutual Fund Service Award.

[DALBAR, Inc.](#) is the financial community's leading independent expert for evaluating, auditing and rating business practices, customer performance, product quality and

service. Launched in 1976, DALBAR has earned the recognition for consistent and unbiased evaluations of insurance companies, investment companies, registered investment advisers, broker/dealers, retirement plan providers and financial professionals. DALBAR awards are recognized as the marks of excellence in the financial community.

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