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DALBAR finds American Century, Edward Jones, Putnam and Wells Fargo put tax resources at their clients' fingertips

(Boston, MA. October 14, 2015) DALBAR, Inc. announced the release of its *Trends and Best Practices in Tax Reporting*. This report recognized those brokerage, mutual fund and annuity firms who emphasize tax resources by making them easy to find and easy to use.

Investors inevitably experience stress during tax time and firms that can make it easy to access the necessary tax documents and resources electronically can help lessen the anxiety felt during this "taxing" season.

The following leading firms made their online tax resources easy to access, placing them in an intuitive location while using design elements that improved the ability to quickly locate information:

- **American Century** earns the top spot and a four star rating not only for making the resources extremely accessible but for employing visual and design features that improve and add appeal to their Tax Center. Front and center is a visual tax mailing schedule that links to more information about each form they send.
- **Edward Jones** Coming off a fresh redesign of www.edwardjones.com, The Edward Jones Tax Center features a strong organization of tax resources by highlighting the major ones with tiles. Clients are able to drill down into each section that applies to them without having to scroll through a list of resources in text format and it maintains its accessibility when viewed through a mobile device.
- **Putnam** is one of the few firms to include a static link on their homepage to their Tax Center, but what really sets them apart is the inclusion of the Tax Center link within their main navigation since many firms relegate the link to the bottom of the page.
- **Wells Fargo** A recurring issue for financial services firms is making helpful resources like a Tax Center understandable to every investor regardless of his or her financial savvy. Wells Fargo helps alleviate some of those issues by really connecting with the need of the client, listing content by need – "Before you file," "While filing," "After April" and asking questions that clients are trying to get answered, such as "How do I find...determine my filing status?"

"Content is king for online tax information and without the resources to support customers during tax time, the Tax Center is rendered useless. Having all the required information there for them can not only reduce call volumes but alleviate customer concerns when they are trying to put all the necessary documentation together to file their taxes" said Kathleen Whalen, Managing Director at DALBAR.

DALBAR takes a systematic approach to evaluating tax statements using a method that has been developed and refined over the past two decades. Broad categories are broken down by contributing criteria and each criterion is assigned a number of points, the sum total of which determines the overall weighting of each criterion. Categories and criteria are developed to reflect the latest innovations in technology and communication strategy, as well as the ever-changing regulatory environment.

For more information on the Trends & Best Practices in Tax Statements please visit the web site at www.dalbar.com or contact Brooke Halloran at 617-624-7273 or bhalloran@dalbar.com

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