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DALBAR ANNOUNCES THE WINNERS OF THE 2019 MUTUAL FUND SERVICE AWARD

*Financial Service Firms Recognized for
Best-in-Class Contact Center Customer Service*

DALBAR, Inc. begins the 2019 award season by announcing the winners of the coveted [Mutual Fund Service Award](#), which recognizes mutual fund providers for delivering best-in-class customer service to mutual fund shareholders.

The Mutual Fund Service Award can only be earned after a year-long review of the [customer service being delivered through the contact center](#). In order to qualify for the award, companies must exceed stringent quality thresholds in criteria covering all aspects of the customer experience.

The 2019 Mutual Fund Service Award winners are:

- ✓ BlackRock
- ✓ JPMorgan Funds
- ✓ New York Life Investments
- ✓ Primerica
- ✓ Putnam Investments
- ✓ VOYA Investment Management
- ✓ VOYA 529 Plans



As DALBAR Director Brendan Yeager explains, “What really sets the DALBAR Service Award apart is our methodology. Instead of relying on surveys, we audit actual customer interactions and compare behaviors to established industry best practices. We don’t just think these award winners provide better service than their peers; we have hard numbers from actual observations to back that up.”

The criteria for the Mutual Fund Service Award includes developing a strong rapport with customers, communicating effectively, properly managing the flow of the call and addressing the appropriate transactional elements related to the customer’s request. The last of these is particularly important considering the complexity of financial products, a tight regulatory environment and potential tax consequences for shareholders.

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For more information about DALBAR, the Mutual Fund Service Award and the Performance Evaluation of Mutual Fund Service program, please visit www.dalbar.com or contact Brooke Halloran at 617-624-7273 or bhalloran@dalbar.com.

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