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Calling All Statements! Be Recognized in DALBAR's 22nd Annual Trends and Best Practices in Investor Statements Report

See how your firm's statement compares to the industry and receive a complimentary statement review

(Marlborough, MA., August 13, 2019) [DALBAR's Trends & Best Practices in Investor Statements](#) is an annual publication that recognizes the top brokerage, mutual fund, variable annuity and retirement plan statements. Each year, DALBAR reviews hundreds of statements to identify those that excel in offering not only the required account and transaction details but the supplemental information that assists customers with financial planning as well as understanding this crucial document.

2018 Statement Statistics

- *73% of plan participant statements show an investment allocation breakdown, but only 9% do it visually despite 60% of investors preferring charts and graphs to help illustrate account details.*
- *A link to enrolling in the service is essential to an e-delivery statement promotion and 86% of variable annuity promotions provide a link – which is better than statements across all industries (80%).*
- *Even though 94% of brokerage statements display a “Change in Value” within the Account Summary, only 31% offer a note on the page explaining how this figure is calculated.*

Firms that submit a statement for review will receive a complimentary summary outlining how the statement scores based on DALBAR's standardized evaluation criteria and a listing of where it stands in comparison to industry leaders in design, content and/or organization.

Top scoring statements will be eligible for DALBAR's Communications Seal of Excellence; an achievement that underscores firms' commitment to quality client communications.

Securely submit your statement for review in DALBAR's 22nd Annual Trends and Best Practices report! Email Jared Licklider at statements@dalbar.com .

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