

## **DALBAR's 2024 Mobile InSIGHT Review: Top Financial Firms Setting the Standard in Mobile Optimization**

MARLBOROUGH, MA, February 3, 2025 – DALBAR, Inc. announced the financial services firms recognized in its **2024 Mobile InSIGHT** review today. This annual review evaluates the mobile-optimized websites of financial services firms to identify those that provide a superior user experience.

“We are pleased to recognize these firms’ commitment to providing an excellent mobile experience for their customers,” said Shelley Eramo, Director at DALBAR. “They have demonstrated a clear understanding of the needs of on-the-go customers and developed mobile-optimized websites that are both intuitive to use and enable seamless account management.”

DALBAR audits mobile-optimized websites based on 11 criteria, including design, security, ease of use, and personalization. Among the highest scorers in each of the three categories (retirement, life insurance & annuity, and mutual fund) are:

### **Employer-sponsored Retirement Plans**

- Nationwide (Public Sector)
- Corebridge Financial
- Nationwide (Private Sector)
- Voya Financial
- Sentinel Group
- TIAA

### **Life Insurance & Annuities**

- Nationwide
- Fidelity
- USAA
- Lincoln Financial
- Corebridge Financial

### **Mutual Funds**

- Franklin Templeton
- TIAA
- American Century Investments

These firms’ mobile web experiences received a DALBAR Designation of ‘Excellent’ and are leading the way in mobile user experience, providing intuitive, informative, and customer-centric designs. Their commitment to innovation and continuous improvement sets a high bar for the industry.

## About DALBAR

DALBAR is the source of independent market research dedicated to raising the standards of excellence in the financial services industry. Focusing on audience behavior and communications, DALBAR provides research, ratings, and benchmarking that empower financial firms to create impactful and meaningful connections with their clients.

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