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TELEPHONE SERVICE MATTERS TO FINANCIAL ADVISORS HERE'S WHO DOES IT BEST

Even with all of the modern tools at their disposal, financial advisors rely on the contact centers of the financial service providers they work with to transact business and resolve complex issues.

Unlike the average investor, who will only call in once or twice per year, financial advisors interact with client service teams on a regular and ongoing basis. As a result, the quality of the service they are receiving can have a cumulative effect. There is little doubt that the contact center experience influences their selection of products.

“When an advisor has a complicated issue they need to resolve for one of their clients they want a friendly, knowledgeable, and, above all else, competent professional they can reach out to.” DALBAR Director Brendan Yeager explained. “A highly effective representative is not only a pleasure to work with; they also make the advisor look good in their clients’ eyes.”

In 2017, a select group of top-tier financial firms stood out from a crowded field as the best-in-class service providers to financial advisors. DALBAR is excited to announce the following winners of the 2017 Financial Intermediary Service Award:

- Goldman Sachs
- BlackRock
- Pacific Life
- Transamerica Annuities
- Franklin Templeton

The Financial Intermediary Service Award is earned through an objective and rigorous third-party evaluation of the quality of contact center interactions with financial professionals. These interactions are reviewed throughout the year against detailed criteria covering all aspects of the advisor’s experience. In order to qualify for the Award, companies must exceed quality thresholds in all criteria.

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 recognition for consistent and unbiased evaluations of investment companies, registered investment advisers, insurance companies, broker/dealers, retirement plan providers and financial professionals. DALBAR awards are recognized as marks of a superior standard of care in the financial community.

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

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