



Release Date: November 29, 2018

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DALBAR ANNOUNCES 2018 MUTUAL FUND SERVICE AWARD WINNERS

Companies across all industries are increasingly recognizing the importance of the customer experience as a means of differentiating themselves from the competition. This is particularly true in the mutual fund industry, where companies are unable to guarantee a long-term performance advantage over the competition. What they can guarantee however, is a consistently superior customer experience.

As DALBAR Director Brendan Yeager explains, “While digital interactions (whether through traditional websites or via mobile devices) often get more attention, the traditional contact center remains a critical service channel. When complicated issues arise, or when other channels don’t work perfectly, having a competent and engaged human being to turn to goes a long way.”

It is in this context that DALBAR is excited to announce the winners of the 2018 Mutual Fund Service Award recognizing those companies who are able to consistently deliver a best-in-class telephone service experience. The 2018 Mutual Fund Service Award winners are:

- ✓ BlackRock
- ✓ DWS
- ✓ Goldman Sachs
- ✓ JPMorgan Funds
- ✓ MainStay Investments
- ✓ Primerica
- ✓ Putnam Investments
- ✓ VOYA Investment Management
- ✓ VOYA 529 Plans



In order to earn the Mutual Fund Service Award companies must undergo a thorough and independent audit looking at the quality of contact center interactions with mutual fund shareholders. These interactions are reviewed throughout the year against detailed criteria covering all aspects of the customer experience. In order to qualify for the Award, companies must exceed stringent quality thresholds in all criteria.

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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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