

## DALBAR Highlights Industry Leading Plan Participant Web Sites

(Boston, MA - January 2010) After rigorous testing and evaluation, DALBAR recognized the top plan participant sites in its 3<sup>rd</sup> quarter DC WebMonitor Web site ranking. Holding its status for the third straight quarter, Schwab Retirement Plan Services was identified as the #1 plan participant Web site. Its extensive level of functionality and numerous onsite support features has enabled the site to maintain its high ranking. Merrill Lynch's ease of use and range of functionality has placed it in the #2 spot for the second straight quarter. Rounding out the top five are Principal Financial, Transamerica and Fidelity in the respective 3<sup>rd</sup>, 4<sup>th</sup> and 5<sup>th</sup> spots. The top 5 participant sites all earned DALBAR's designation of 'Excellent'.

### LEADERSHIP REPORT-QUARTER 3-2009

DALBAR's Q3-2009 Defined Contribution Plan Participant Leadership Report features a ranking of the Top 10 participant Web sites as well as an insightful E-ERISA Commentary that discusses the need to address both short-term and long-term participant concerns. Additionally, research entitled, "Projecting Participant Preparedness" takes a look at those sites that effectively inform participants of their place and pace on the road to retirement. The report also highlights selected industry leading Web sites and the characteristics that give them that status. Quarter three's Leader Focus includes Principal Financial and J.P. Morgan's Web sites

### THIRD QUARTER RANKINGS - DEFINED CONTRIBUTION - PLAN PARTICIPANT SITES, 2009:

Web Ranking	Firm
# 1	Schwab Retirement Plan Services Company
# 2	Merrill Lynch
# 3	Principal Financial
# 4	Transamerica
# 5	Fidelity

DALBAR's DC WebMonitor offers Defined Contribution plan service providers up-to-date and critical information regarding the Web presence of retirement industry firms. Highlights of the program include quarterly rankings, e-mailed industry updates as well as access to an online database of industry intelligence.

DALBAR, Inc., the nation's leading financial-services market research firm, is committed to raising the standards of excellence in the financial-services industry. With offices in both the US and Canada, DALBAR develops standards for, and provides research, ratings, and rankings of intangible factors to the retirement, mutual fund, broker/dealer, discount brokerage, life insurance, and banking industries. They include investor behavior, customer satisfaction, service quality, communications, Internet services, and financial-professional ratings.

[For additional information about DALBAR's Quarterly Leadership Reports or DC WebMonitor,](#)

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