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DALBAR Seeks out the Best of the Best Among Investor Account Statements

(Marlborough, MA 4/12/2023) Analysis is complete and the results from DALBAR's 25th annual study of investor account statements have been revealed!

With its use of color to effectively draw attention to the most critical values on the statement, **BNY Mellon | Pershing** achieved the top position among brokerage statements, in addition to hitting an all-time high score.

Landing in the top spot among defined contribution and total retirement statements, as well as holding the #2 spot among brokerage statements, saying **Bank of America Merrill** fared well in the rankings is a considerable understatement. "We are honored to be recognized by DALBAR for excellence in our defined contribution, brokerage and total retirement statements – especially as this is the 12th consecutive year that we have been ranked #1 for our defined contribution statements," said John Quinn, Managing Director, Head of Institutional Retirement Products & Distribution, Bank of America. "Developing clear and consistent communications is another example of how Bank of America is fulfilling our commitment to address the evolving needs and expectations of investors and help them achieve their financial goals."

With some of the most extensive rider and guarantee values displayed on their statement, **Corebridge Financial** earned the highest rank among annuity statements and achieved a score almost 13 points above the industry average.

Congratulations to BNY Mellon | Pershing, Bank of America Merrill and Corebridge Financial for demonstrating a strong commitment to providing their customers with communications of Excellence!

In addition to comprehensive ranking data, DALBAR's *Trends & Best Practices in Investor Statements* highlights themes specific to brokerage, mutual fund, retirement, and annuity statements, as well as those common among all business lines. Please visit [DALBAR's Intellect store](#) for more details about this study.

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