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DALBAR Crowns Investment Companies with Superior Service Centers

(Marlborough, MA, 1/11/2023) The year 2022 was a challenging one for mutual funds that put extraordinary stress on the industry. Six firms tracked by DALBAR stood out in this tumultuous year, rising to support investors when the need was greatest. Their contact centers were available and responsive to shareholders.

These winners were:

- DWS
- JP Morgan Funds
- New York Life Investments
- Primerica Financial Services
- Putnam Investments
- Thrivent Mutual Funds

“While many firms sought to cut corners during market volatility, award winners maintained their service levels to investors in spite of economic pressures.” commented Cory Clark, Chief Marketing Officer at DALBAR, Inc.

The winners of the DALBAR Service Awards are determined by an audit of actual customer experiences over the course of the year. Representative performance is evaluated against superior service standards and industry best practices. The expert evaluation of real calls throughout the year provides the most reliable measure of customer service excellence that exists in the industry. To earn this distinction, companies need to exceed a high bar across the shareholder customer service experience.

DALBAR awards are recognized in the financial community as the standard of excellence.

DALBAR is an independent third-party expert, providing audits, evaluations, ratings, and due diligence. DALBAR certifications are the mark of excellence in the financial services community.

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