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## DALBAR Study Finds American Funds, Putnam and Voya are Pioneers in Professional Mobile Support

(Boston, MA. February 24, 2015) DALBAR, Inc. announced today the release of its evaluation of financial services firms' financial advisor web sites. This evaluation included an in-depth study and review of 39 Web sites.

After a comprehensive analysis of Web sites within the mutual fund industry, it turns out comparatively few deliver a mobile optimized experience. In fact, less than half, 48% to be exact offer any sort of mobile-formatted experience, and of that already small group, only 68% provide an experience that supports financial advisor needs. To overlook this group equates to missed opportunities to strengthen ties to the company, grow brand exposure, and increase accessibility.

However, three firms did emerge as the shining stars in offering professional mobile support. These firms offer everything advisors need to manage their business from an on-the-go format:

- **American Funds'** mobile experience includes access to market insights, product information, a suite of sales tools and resources, as well as logins to the American Funds' advisor site.
- **Putnam Investments** pulls out all the stops for its advisors, providing key commentary, business building tools, fund information and access to client accounts. The firm's distinguished "Advisor Tech Tips" resource empowers professionals to stay abreast of trends within the technology sector and coaches them as to how this medium can benefit their book of business.
- **Voya Financial** offers advisors a suite of tools and resources that help them manage their business 24/7. In addition to being able to access market commentary and product information, advisors can access client account information and an array of sales tools and ideas designed to help them grow and maintain their book of business.

"There are currently 4.3 billion mobile users worldwide and this is only expected to grow. Firms that have not established a mobile presence are missing out on a golden opportunity to stay connected to audiences that are adopting and adapting to all things mobile," said Kathleen Whalen, Managing Director of DALBAR. She added, "Firms that fail to respond will pay a stiff penalty for being last to the party."

The Web sites were evaluated using DALBAR's Mutual Fund WebMonitor program criteria. DALBAR evaluates mutual fund financial professional Web sites on a quarterly basis. Web sites are scored on a 100-point scale in several criteria, which are grouped into five broad categories: Functions, Usability, Content Currency, Consistency, and Behavior Centric.

For more information on DALBAR's Mutual Fund [WebMonitor Program](#), please visit the web site at [www.dalbar.com](http://www.dalbar.com) or contact Nicole Struzziery at 617-624-7153 or [nstruzziery@dalbar.com](mailto:nstruzziery@dalbar.com).

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