



Release Date: December 10, 2020

Media Contact: Jamie Josephs
617.624.7159
jajosephs@dalbar.com

DALBAR RECOGNIZES MUTUAL FUND PROVIDERS FOR BEST-IN-CLASS SERVICE TO SHAREHOLDERS

DALBAR is excited to announce the winners of the 2020 **Mutual Fund Service Award**. These award-winning institutions stood out from the competition in the quality of telephone service being provided to mutual fund shareholders. The 2020 award winners are:

- ✓ JPMorgan Funds
- ✓ New York Life Investments
- ✓ Primerica
- ✓ Putnam Investments
- ✓ Thrivent Mutual Funds
- ✓ VOYA Investment Management
- ✓ VOYA 529 Plans



DALBAR Director Brendan Yeager explains the significance of this year's awards, "2020 has been a uniquely challenging year for contact centers. It has also been a difficult year for shareholders, who are facing pandemic-induced stresses, volatile markets and, in many cases, financial hardship. We recognize that having a friendly, competent and efficient representative available to help shareholders when they need to call their mutual fund providers is more important now than ever. For this reason, companies were held to the same exacting standards to earn our Service Awards in 2020 that they would have been in any other year. That these firms were able to deliver a superior standard of care in spite of the pandemic and accompanying disruptions really speaks to their strong culture and the priority that they place on their customers. It is a remarkable accomplishment."

The Mutual Fund Service Award is earned through an objective and rigorous third-party audit of the quality of contact center interactions with mutual fund shareholders. Telephone service experiences are reviewed against detailed criteria based on superior service standards and industry best practices. To qualify, companies must perform at a high level in all aspects of the customer experience. This multi-faceted approach considers everything from the interpersonal relationship, to the handling of the transactional elements of the call and everything in between. Shareholders at these firms can expect an exceptional and well-rounded experience every time they pick up the phone.

For more information about [DALBAR Awards](#) and other [Customer Experience Audit programs](#), please contact Brooke Halloran at 617-624-7273 or bhalloran@dalbar.com.

[DALBAR, Inc.](#) is the financial community's leading independent expert for evaluating, auditing and rating business practices, customer performance, product quality and service. Launched in 1976, DALBAR has earned recognition for consistent and unbiased evaluations of investment companies, registered investment advisers, insurance companies, broker/dealers, retirement plan providers and financial professionals. DALBAR awards are recognized as marks of a superior standard of care in the financial community.

###