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***DALBAR Announces Best Statements of 2015  
BlackRock, Bank of America Merrill Lynch and Merrill Lynch Wealth  
Management Come Out on Top***

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(Boston, MA. January 26, 2016) DALBAR, Inc. released its 18<sup>th</sup> annual *Trends and Best Practices in Investor Statements* report which evaluates the statement's ability to address the needs of both investors and financial advisors. BlackRock achieves excellence for their mutual fund statement, Bank of America Merrill Lynch and Merrill Lynch Wealth Management both ranked #1 in the highly competitive defined contribution and brokerage markets respectively.

The investor statement is the most widely read document by investors and the most frequently sent document by financial services companies. In fact, it is often the only personalized communication received by investors and is their physical proof of ownership.

These industry leaders understand how important and powerful a servicing tool the statement truly is and make it a priority to ensure it provides all the details necessary for an investor to understand their financial picture. Each of these firms makes sure that there is a summary of the account up front and center as this is what every investor wants to know – "how much do I have?" They then take a top down approach to communicating the status of the account, beginning with the broadest of summaries, then gradually expanding in depth and detail.

"These firms are continuously faced with the overwhelming challenge of how to best paint the investor's financial picture in an ever changing economic landscape." said Kathleen Whalen, Managing Director at DALBAR. She added, "They have risen to that challenge by effectively providing a holistic view that builds trust and confidence among both clients and financial professionals."

DALBAR takes a systematic approach to evaluating statements using a method that has been developed and refined over the past two decades. Statements earned credit for including features that strongly impact an investor's ability to act prudently and make financial decisions. Features include the ability to understand the significance of the information, answer pertinent questions and utilize design elements that enhanced their overall effectiveness.

For more information on DALBAR's 18<sup>th</sup> Annual Trends & Best Practices, please contact Brooke Halloran at 617-624-7273 or [bhalloran@dalbar.com](mailto:bhalloran@dalbar.com).

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