



19TH ANNUAL TRENDS & BEST PRACTICES IN INVESTOR STATEMENTS

Introduction

DALBAR's Trends and Best Practices in Investor Statements is an annual evaluation and ranking of statements in the following distribution channels:

- ✓ Brokerage
- ✓ Mutual funds
- ✓ Variable annuities
- ✓ Retirement plans

Results offer a series of detailed reports that identify and rank top-performing statements by channel, summarize current best practices in statement content and design and reveal emerging industry trends.

Benefits

This report guides firms in producing statements that influence positive behavior and are forward thinking, ultimately helping to:

- ✓ Determine if the statement meets client needs and expectations.
- ✓ Reduce expenses such as statement-related spikes in call center activities.
- ✓ Identify features that your firm should consider incorporating into your statement
- ✓ Make the case internally to redesign or update the statement.
- ✓ Promote your success when applicable
- ✓ Provide access to examples of best-in-class statements

Deliverables

A comprehensive industry report that includes:

- ✓ DALBAR'S 2016 Industry Perspective on enhanced decision making
- ✓ Leading statements of 2016
- ✓ 2016 Key Findings by the Numbers
- ✓ Notable Statement Enhancements in 2016
- ✓ Industry Trends and Best Practices
- ✓ Evaluation Methodology



- ✓ Industry Rankings
- ✓ Industry Standards in Content and Design
- ✓ Online Access to Top Best Practices Statement Samples

An optional Gap Analysis of an individual statement's score:

- ✓ Detailed assessment of a firm's statement, identifying specific areas for improvement and providing examples of best practices for those areas
- ✓ A half-hour consultation with DALBAR Communication Analysts

Cost

Any firm can submit an investor statement for review in any of the channels. There is no cost associated with submission.

The pricing structure for the Trends & Best Practices in Investor Statements Industry Report and a Gap Analysis are:

Trends & Best Practices in Investor Statements Industry Report	\$4,950
Reduced Rate for Members of <i>DALBAR's Advisory Board for Client Reporting</i>	\$2,500
Gap Analysis of your firm's statement	\$3,950

Please use the link below to order the Trends & Best Practices in Investor Statements and/or a Gap Analysis of your firm's Statement:

<https://www.secure.dalbar.com/research.dalbar/public/orderstudy.aspx?study=ATBP18>

Questions?

For more information about the 19th Annual Trends & Best Practices Report, please contact Brooke Halloran at 617.624.7273 or bhalloran@dalbar.com.