

WHAT TO EXPECT FROM US

By engaging our services and signing up for our programs, we become your partner throughout the year. This means you and your staff can pick up the phone or email us at any time to get immediate attention to your plans, research questions and quickly validate industry trends.

We strive to establish a close working relationship with our clients so that we are in fact an extension of your own team. Our work with your company is held in the strictest confidence, but you benefit from a knowledgeable external resource that you can rely on at all times.

To find out more, call us at 617-723-6400 or visit us at www.dalbar.com



600 Atlantic Avenue, FL 30
Boston, MA 02210
617.723.6400 ph
617.624.7200 fax
www.dalbar.com



The independent, third-party expert

research
&
communications



RESEARCH & COMMUNICATIONS SOLUTIONS

- TRENDS & BEST PRACTICES IN INVESTOR STATEMENTS
- STATEMENT EVALUATIONS
- CUSTOMIZED COMMUNICATIONS EVALUATION
- ADVISORY BOARD: FINANCIAL SERVICES COMMUNICATIONS
- E-DELIVERY ADOPTION SERVICES
- SURVEYS
- FOCUS GROUPS
- INDUSTRY REPORTS
 - ✓ E-DELIVERY BENCHMARKS AND BEST PRACTICES
 - ✓ E-DELIVERY PROMOTION ON THE WEB
 - ✓ INVESTOR FINANCIAL ADVISER SATISFACTION BENCHMARKS
 - ✓ INVESTOR STATEMENT PREFERENCES STUDY
 - ✓ PRIVATE CLIENT STATEMENT TRENDS & BEST PRACTICES

Independent third-party recognition at work for you

DALBAR AWARDS HAVE LONG BEEN THE GOLD STANDARD OF SERVICE IN THE FINANCIAL SERVICES INDUSTRY.

DALBAR's awards recognize industry-leading companies that provide superior service and support to their clients and constituents. Firms who attain DALBAR's recognition may display these signs of distinction on their websites, print material and other promotional collateral to advertise their stellar performance as leaders within their industry. Winners of a DALBAR award can confidently promote themselves as service leaders in their field.



flexible solutions for your business needs

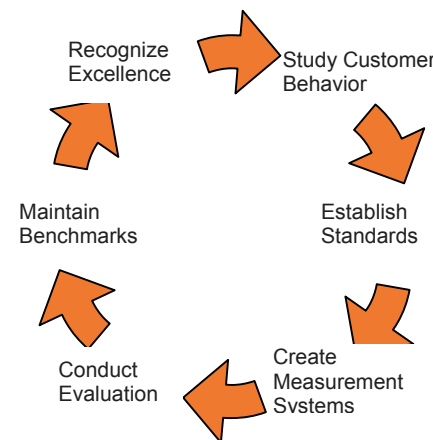
OUR CONSULTATIVE APPROACH PROVIDES CUSTOMIZED SOLUTIONS.

WE VALIDATE YOUR SUCCESS

Our research and evaluation process follows a well established research process and methodology which ensures that we provide our clients with a consistent level of research across all areas. All our reports are structured to makes it easy to cross-check information and understand how trends vary over time and across various business lines.

Our benchmarks are based on up-to-date research that ensures consistency and accuracy across all areas we cover.

We welcome the opportunity to work with you and your team as partners and offer you our best insights and frank advice so you have the feedback you need to make effective, well-informed decisions.



... AND WE HELP YOU GET THE COMPETITIVE EDGE

We are an independent market research firm, which means we are not aligned with any particular vendor, technology or industry group. As such, we are not influenced to champion any particular point of view or position.

Our research provides both quantitative and qualitative information, including competitive standing and best-in-class examples. Our goal is to provide customers with the best possible real-life data available, based on impartial but contextual market research. This allows us to provide clients with the necessary insight to leapfrog competitors and achieve industry leading status.

Our purpose is to inform – so that you can deliver on your corporate commitment to excellence.



CUSTOM SOLUTIONS

Programs tailored uniquely for your business, based on your specific business priorities and objectives.



SUBSCRIPTION BASED PROGRAMS

Allows clients to subscribe to audience and/or channel specific competitive benchmarking data for an annual fee. Ongoing reports are released on a pre-established schedule. Most recent updates are delivered in a membership unlimited access model.



INDUSTRY REPORTS

Expert analysis and statistics about emerging trends and developments provide current, competitive and benchmarking information when you need it.

