

DALBAR'S Research & Communications Products & Services

Products & Services	Description	Cost
Trends and Best Practices in Investor Statements	DALBAR's Trends and Best Practices in Investor Statements program guides financial services firms in delivering statements that meet the needs of consumers and financial professionals while minimizing costs and maximizing effectiveness. The results show the ranking of statements, analysis of customer needs, and industry best practices.	Cost ranges from \$3,000 - \$5,000
Customized Communications/ Statement Evaluations	DALBAR evaluates all communications pieces including but not limited to statements, welcome kits, annual reports, newsletters, marketing material and much more. DALBAR takes a critical look at your existing or newly designed communications in the context of DALBAR's customer driven measurements and our inventory of related communications pieces in order to recommend the most practical approach to make improvements within the constraint of your firm's goals and budget.	Cost ranges from \$5,000 - \$15,000
DALBAR's Communications Seal	The DALBAR Communications Seal is used to differentiate those organizations that recognize the importance of customer communications and that have developed high quality solutions to meet their customers needs, preferences, and accessibility requirements. The Seal is the third party endorsement of written and electronic communications that establishes an organization as an industry leader in this critical area.	Typical cost for a Communications Seal Evaluation ranges from: \$5,000 - \$7,500 plus \$1,500 for the rights to use the seal (if earned)
Formal Presentation	DALBAR will conduct a formal in-person presentation sharing your firm's results from the communication evaluation. Best practices will be shared and recommendations for improvement will be outlined. Stakeholders responsible for improvement of your communications/statements will find tremendous value in leveraging DALBAR's expertise at this session. Input will also be given by DALBAR's Strategic Partners: Simplified Communications Group Inc. & T-Base Communications Inc.	\$2500 plus travel costs

DALBAR'S Research & Communications Products & Services (continued)

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<p>Accessibility Initial Assessment & Recommendations</p>	<p>Accessibility compliance requirements continue to change for client communications. Together with T-Base Communications (North America's alternate format communications leader), DALBAR will conduct an Initial Assessment of your firm's client communications and provide tangible recommendations to help your firm make informed choices with accessible content design and ensure accessibility compliance requirements are met.</p>	<p>Cost ranges from \$2,500 - \$9,500</p>