

Merrill Lynch Retirement Services Contact Centers Certified by J.D. Power

Recognized for Providing an Outstanding Live Phone Channel Customer Service Experience

COSTA MESA, Calif.: 16 Dec. 2016 — Merrill Lynch Retirement Services has been recognized for contact center operation customer satisfaction excellence in the live phone channel under the J.D. Power Certified Contact Center Program.SM

The Certified Contact Center Program distinction acknowledges a strong commitment by Merrill Lynch Retirement Services contact center operations to provide “An Outstanding Customer Service Experience.”

- To become certified, the contact center successfully passed an evaluation of dozens of best practices that encompass their integration of Voice of the Customer and Voice of the Employee insights into their business operations.
- As part of its evaluation, J.D. Power conducted a random survey of Merrill Lynch Retirement Services customers who recently contacted the company’s contact centers in Jacksonville, Fla., and Hopewell, N.J.

“Congratulations to the Merrill Lynch Retirement Services team for achieving this milestone of certification for the 12th consecutive year,” said **Mark Miller, contact center practice leader at J.D. Power**. “The research is clear in identifying areas of excellence in each of the five key attributes we measure for customer service reps: timeliness of resolution; promptness in speaking to a person; courtesy; concern; and knowledge of the representative. This high performance at the attribute level helps explain how the Merrill Lynch Retirement Services team provides an outstanding customer experience so consistently.”

“As our clients are our top priority, serving millions of plan participant clients each day, we are honored to receive this recognition for 12 consecutive years,” said **Lorna Sabbia, head of retirement and personal wealth solutions for Bank of America Merrill Lynch**. “We understand the value of contact centers and believe they play a critical role in our commitment to improving clients’ journey to retirement and their financial wellness overall.”

“This certification from J.D. Power is a strong demonstration of how truly dedicated our client services teammates are,” said **Bill Pappas, Retail, Preferred & Small Business, GWIM Operations and GDCE executive at Bank of America**. “We are committed to providing our clients with superior service and honored to receive recognition for these efforts.”

For Certification Status:

- A contact center must also perform within the top 20% of customer service scores, which are based on benchmarks established in J.D. Power’s cross-industry customer satisfaction research.
- The research criteria include the customer service representative’s courtesy, knowledge and concern for the customer; promptness in speaking to a person; and timely resolution of the problem or request.

The Certified Contact Center Program, which was launched by J.D. Power in 2004 as the Certified Call Center Program, evaluates overall customer satisfaction with live phone interactions and helps

organizations in various industries increase their efficiency and effectiveness by establishing and continually updating leading practices for handling service calls. The program certifies a call center's operations in three areas: live phone channel, IVR self-service channel and Web self-service channel.

For more information on the [Certified Contact Center Program](#), please visit <http://www.JDPower.com>.

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