

Contact: Frank Dudley
fdudley@financialmarketinginstitute.com
Phone: 917-952-3302

February 21, 2023

Press Release

The Financial Marketing Institute announces Leading Financial Services Companies in Digital Experience for 2023

The Financial Marketing Institute, the provider of the most comprehensive research and analytics for financial marketers, today announces the leading financial services companies in digital experience for 2023.

As part of its annual *Digital Marketing of Financial Services Research and Analytics Initiative*, the firm evaluates scores and ranks the top 200 companies in the U.S. (identified by AUM) in several verticals within the financial services industry: Asset Management, Wealth Management, Life Insurance, P&C Insurance, Retail Banking, Commercial Banking, Investment Banking and Credit Unions.

The research is completed at the end of each calendar year and results and insights are shared with sponsor participant firms during the ensuing year. Each financial services company is evaluated, scored and ranked via proprietary and rigorous models that the firm has developed and continues to evolve in four key areas of digital experience: Social Media Experience, Mobile Experience, Website Experience and Customer Experience.

“Our digital experience models are quantitatively driven and, therefore, enable us to provide very specific analysis to our sponsor participants on where they are excelling and where there is room for improvement in different aspects of digital customer experience,” says Frank Dudley, President of the Financial Marketing Institute. “Some of our models have dozens of variables that serve as inputs into the overall score and ranking.”

The firm recognizes Leading Financial Services Companies in Digital Experience for 2023 as those companies that are ranked among the top five companies for each of the eight verticals and each of the four digital experience models. The firm also recognizes the #1 ranked firm as the Top Performer for the year.

Asset Management					
Rank	Designation	Social Media Experience	Mobile Experience	Website Experience	Customer Experience
1	Top Performer	Lazard	Bank of America	JPMorgan Chase	Bank of America
2	Leading Company	Cambridge Investment Research	USAA	Fidelity Investments	Wells Fargo
3	Leading Company	Credit Suisse	State Farm Insurance	Wells Fargo	Fidelity Investments
4	Leading Company	Bank of America	Credit Suisse	Allspring Global Investments	JPMorgan Chase
5	Leading Company	Edward Jones	Charles Schwab	Bank of America	Edward Jones

Wealth Management					
Rank	Designation	Social Media Experience	Mobile Experience	Website Experience	Customer Experience
1	Top Performer	Cydeo Wealth Partners	U.S. Bank Wealth Management	Fidelity	Fidelity
2	Leading Company	Goldman Sachs	Bank of America	Wells Fargo	Bank of America
3	Leading Company	Key Financial	Fidelity	Edward Jones	Wells Fargo
4	Leading Company	Citibank	Wells Fargo	Charles Schwab	Edward Jones
5	Leading Company	Bank of America	Charles Schwab	Bank of America	Morgan Stanley

Life Insurance					
Rank	Designation	Social Media Experience	Mobile Experience	Website Experience	Customer Experience
1	Top Performer	Allstate Life Companies	National Life Group	USAA Life Group	State Farm Life Group
2	Leading Company	ELCO Mutual Life and Annuity	Anthem Life Insurance Company	UnitedHealth Life Companies	USAA Life Group
3	Leading Company	Illinois Mutual Life Insurance Co	Trustmark	State Farm Life Group	Primerica Group
4	Leading Company	First Catholic Slovak Ladies USA	State Farm Life Group	Aetna Life Group	National Life Group
5	Leading Company	State Farm Life Group	USAA Life Group	Cigna Life Group	Nationwide Mutual Life Group

Property & Casualty Insurance					
Rank	Designation	Social Media Experience	Mobile Experience	Website Experience	Customer Experience
1	Top Performer	CSAA Ins Group	State Farm Group	USAA Group	USAA Group
2	Leading Company	Progressive Insurance Group	UnitedHealth Group	Progressive Insurance Group	State Farm Group
3	Leading Company	Southern Farm Bureau Casualty Group	Liberty Mutual Insurance Company	State Farm Group	Travelers Group
4	Leading Company	Travelers Group	Mercury General Group	Allstate Insurance Group	Primerica Group
5	Leading Company	Nodak Mutual Group	Farmers Insurance Group	AutoOwners Insurance Group	AAA
Retail Banking					
Rank	Designation	Social Media Experience	Mobile Experience	Website Experience	Customer Experience
1	Top Performer	Busey Bank	The Central Trust Bank	JPMorgan Chase Bank	Bank of Baroda
2	Leading Company	MidFirst Bank	First Convenience Bank/First National Bank Texas	Capital One	Bank of America
3	Leading Company	Pinnacle Bank	BankUnited	Bank of America	Capital One
4	Leading Company	Bank of Baroda	American Express National Bank	Wells Fargo Bank	American Express National Bank
5	Leading Company	Zions Bancorporation, N.A.	Citibank	Citibank	JPMorgan Chase Bank
Credit Unions					
Rank	Designation	Social Media Experience	Mobile Experience	Website Experience	Customer Experience
1	Top Performer	Dow Chemical Employees' Credit Union	Texas Dow Employees Credit Union	Navy Federal Credit Union	Navy Federal Credit Union
2	Leading Company	Utah Community Federal Credit Union	DFCU Financial	Apple Federal Credit Union	America First Credit Union
3	Leading Company	BayPort Credit Union	Goldenwest Federal Credit Union	United Federal Credit Union	Mountain America Credit Union
4	Leading Company	HAPO Community Credit Union	Navy Army Community Credit Union	Pentagon Federal Credit Union	BECU

5	Leading Company	Navy Federal Credit Union	ENT Credit Union	First Community Credit Union	VyStar Credit Union
---	-----------------	---------------------------	------------------	------------------------------	---------------------

Commercial Banking					
Rank	Designation	Social Media Experience	Mobile Experience	Website Experience	Customer Experience
1	Top Performer	First Bank	The Central Trust Bank	JPMorgan Chase Bank	Bank of America
2	Leading Company	Busey Bank	American Express National Bank	Capital One	Capital One
3	Leading Company	EagleBank	First Financial Bank	Bank of America	American Express National Bank
4	Leading Company	Merchants Bank of Indiana	UMB Bank	Wells Fargo Bank	Citibank
5	Leading Company	Peoples Bank & Trust	United Community Bank	Citibank	Wells Fargo Bank
Investment Banking					
Rank	Designation	Social Media Experience	Mobile Experience	Website Experience	Customer Experience
1	Top Performer	Goldman Sachs	BNP Paribas	Wells Fargo Bank	Bank of America
2	Leading Company	Peoples Bank & Trust	Peoples Bank & Trust	J.P. Morgan	Wells Fargo Bank
3	Leading Company	Glacier Bank	JPMorgan Chase	Bank of America	Citigroup
4	Leading Company	National Bank of Blacksburg	Nantucket Bank	U.S. Bank	Goldman Sachs
5	Leading Company	Bank of America	BB&T Capital Markets	UBS AG	Morgan Stanley

The Financial Marketing Institute provides industry-specific research, analytics, consulting, executive education, and training to financial marketing executives. It is a primary source of industry trends, benchmarks and training in digital marketing and media for financial marketers.