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## NEWS RELEASE

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### **NAPA NAMES BMSG INSTITUTIONAL SERVICES TO TOP DC ADVISOR TEAMS (2024)**

IRVINE (March 20, 2024) – The National Association of Plan Advisors’ (NAPA) released the list of its Top Defined Contribution (DC) Advisor Teams for 2024 and Benefit Financial Services Group (BMSG Institutional Services) is pleased to announce we are among the nation’s leading retirement plan advisor firms. An area of pride at BMSG is our customized approach to servicing our clients’ needs and offering clients a white-glove approach that stands above the competition.

“Since their inception, NAPA’s various industry lists represent the best of what the retirement plan industry has to offer, setting the bar higher for financial professionals and plan advisors specifically,” said John Sullivan, Chief Content Officer of the American Retirement Association, and Editor-in-Chief of NAPA-Net, the nation’s leading online resource for retirement plan advisors. “The NAPA Top DC Advisor Teams are ranked by self-reported DC assets under advisement and highlight the positive impact they’re making on the nation’s private retirement system.”

This year’s list features a record number of teams (452) - which oversees nearly \$2 trillion in defined contribution plan assets belonging to more than 47,000 plans covering nearly 21 million participants. This year’s teams represented 43 states and the District of Columbia.

Sullivan added, “As the nation’s voice for retirement plan advisors, we are once again pleased to highlight the contributions and commitment of these teams.”

The National Association of Plan Advisors (NAPA) Top DC Advisor Teams listing focuses on teams, broadly defined as being in a single physical location, and having at least \$100 million in Defined Contribution (DC) assets under advisement. It is based on self-reported assets under advisement as of December 31, 2023, unless otherwise noted. The inaugural list was published in 2017. The Top DC Advisor Teams listing can be seen [here](#).

#### **About the National Association of Plan Advisors**

The National Association of Plan Advisors was created by and for retirement plan advisors. Membership is also open to other retirement industry professionals who support the interests of plan advisors. NAPA is the only advocacy group exclusively focused on the issues that matter to retirement plan advisors.

NAPA is part of the American Retirement Association, based in the Washington, D.C. area. More information about NAPA is available at [napa-net.org](http://napa-net.org).

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