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NEWS RELEASE

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MICHAEL ALLBEE, CFP® MAKES THE FORBES/SHOOK BEST-IN-STATE WEALTH ADVISORS (2024)

IRVINE (APRIL 3, 2024) – Benefit Financial Services Group (BFSG), a Registered Investment Advisor serving both institutional and individual clients, is pleased to announce that Michael Allbee, CFP®, has made the sixth-annual Forbes/SHOOK Best-in-State Wealth Advisors list. Collectively, the 8,507 advisors on the Forbes/SHOOK Best-in-State Wealth Advisors list oversee more than \$13.5 trillion in client assets. The full list can be seen [here](#).

“When our clients trust us with their money, they are trusting us with a big part of their life. It’s a massive, humbling responsibility we are honored to take on. We work every day to make the best decisions supporting our client’s happiness, comfort, and financial security,” said Michael Allbee, Partner and Senior Portfolio Manager of BFSG. “We take a stand for all investors, to treat them fairly, and to give them the best chance for investment success.”

The Forbes ranking of America’s Top Wealth Advisors and Best-In-State Wealth Advisors, developed by [SHOOK Research](#), is based on an algorithm of qualitative criteria learned through telephone, virtual and in-person due diligence interviews, and quantitative data such as revenue trends and assets under management. The algorithm additionally weighs factors such as service models, compliance records and industry experience, and focuses on those that encompass best practices in their approach to working with clients. All advisors that are considered have a minimum of seven years’ experience. Portfolio performance is not a criterion due to varying client objectives and lack of audited data. More about the methodology can be found [here](#).

Disclaimer: Awards and recognitions by unaffiliated rating services, companies, and/or publications should not be construed by a client or prospective client as a guarantee that he/she will experience a certain level of results if the Firm is engaged, or continues to be engaged, to provide investment advisory services; nor should they be construed as a current or past endorsement of the Firm or its representatives by any of its clients. Rankings published by magazines and others are generally based exclusively on information prepared and/or submitted by the recognized adviser. The Firm did not pay a fee for inclusion on this list.