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## NEWS RELEASE

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### **BENEFIT FINANCIAL SERVICES GROUP (BFSG) NAMED ONE OF BARRON'S "TOP 100 INSTITUTIONAL CONSULTING TEAMS" FOR 2024**

IRVINE (May 14, 2024) – Benefit Financial Services Group (BFSG Institutional Services), a multi-faceted registered investment advisory firm serving both institutional and individual clients, is pleased to announce it has been ranked (#82) in Barron's again as a "Top 100 Institutional Consulting Teams" for 2024. The Barron's listing can be seen [here](#).

"Since our founding, we've believed in doing the right kind of business, done the right way, and we go the extra mile to deliver a custom client experience to the growing financial institutions that rely on us. From adding client requests to our standard reporting package, to creating ad hoc reports, to answering questions between Committee meetings, BFSG offers clients a high-touch approach." said Chris Rowley, a Principal, and Senior Retirement Plan Consultant at BFSG.

This annual ranking is performed by Barron's. Registered Investment Advisors, Institutional Consultants, and Wealth Management Firms complete a 102-question survey about their practice. Barron's verifies the data with the advisors' firms and with regulatory databases and then they apply their rankings formula to the data to generate a ranking. The formula features three major categories of calculations: (1) Assets (2) Revenue (3) Quality of practice. In each of those categories they do multiple subcalculations. Barron's measures the growth of advisors' practices and their client retention. They also consider a wide range of qualitative factors, including the advisors' experience, their advanced degrees and industry designations, the size, shape, and diversity of their teams, their charitable and philanthropic work and, of course, their compliance records. 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.*