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NEWS RELEASE

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BENEFIT FINANCIAL SERVICES GROUP (BFSG) NAMED ONE OF FORBES “TOP RIA FIRMS” FOR 2024

IRVINE (October 9, 2024) – We're thrilled to announce that Benefit Financial Services Group (BFSG) is ranked (247) by Forbes as one of America's Top RIA Firms in 2024. The third annual Forbes/Shook Top RIA list highlights firms that have strong track records when it comes to stewarding client wealth and preserving it for the long term. Collectively, the 250 advisory firms on this ranking are overseeing more than \$1.6 trillion in assets.

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 personalized client experience to the successful families and growing financial institutions that rely on us.

See the full list here: <https://www.forbes.com/lists/top-ria-firms/>

The Forbes ranking of America's Top RIA Firms, developed by [SHOOK Research](#), is based on an algorithm of qualitative criteria, mostly gained through telephone, virtual and in-person due diligence interviews, and quantitative data. The algorithm weighs factors like revenue trends, assets under management, compliance records, industry experience and those that encompass best practices and approach to working with clients. Portfolio performance is not a criterion due to varying client objectives and lack of audited data. There is no application fee to participate. 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.