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NEWS RELEASE

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BENEFIT FINANCIAL SERVICES GROUP (BFSG) NAMED ONE OF NEWSWEEK'S "TOP FINANCIAL ADVISORY FIRMS" FOR 2025

IRVINE (November 20, 2024) – We're thrilled to announce that Benefit Financial Services Group (BFSG) was ranked by Newsweek as one of America's Top Financial Advisory Firms for 2025. According to Newsweek, the top 750 advisory firms on the list go beyond the basics, offering innovative financial solutions, a commitment to fiduciary responsibility and a client-first approach.

"We are honored to be ranked by Newsweek as one of the Top Financial Advisory Firms for 2025. We are grateful to get to guide and support our client's life, goals, and legacy." said Michael Allbee, a Principal and Senior Portfolio Manager at BFSG.

See the full list here: <https://www.newsweek.com/rankings/americas-top-financial-advisory-firms-2025>

Newsweek, in partnership with Plant-A Insights Group, analyzed over 15,000 financial advisories registered with the SEC. They screened firms with more than \$20 million assets under management (AUM), a minimum of 3 wealth advisors, at least 5 individual clients, and at least two years of SEC registration. Firms were also screened for clean disciplinary records and the availability of portfolio management services to individual investors. Each firm was then scored based on the following factors: asset performance, client performance, adviser expertise and client ratio, breadth of service offerings and conflicts of interest. 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.