



2040 Main Street, Suite 720
Irvine, CA 92614
(949) 955-2552
www.bfsg.com

NEWS RELEASE

Contact: Michael Allbee, CFP®
Phone: (714) 282-1566
Email: mallbee@bfsg.com

For Immediate Release
March 19, 2025

NAPA NAMES BFSG TO TOP DC ADVISOR TEAMS (2025)

IRVINE (March 19, 2025) – The National Association of Plan Advisors’ (NAPA) released the list of its Top Defined Contribution (DC) Advisor Teams for 2025 and Benefit Financial Services Group (BFSG) is pleased to announce we are among the nation’s leading retirement plan advisor firms. Since their inception, NAPA’s various industry lists have been a venerable who’s-who of standouts in the world of retirement plans and retirement plan advisors. What sets BFSG apart is our tailored approach to our clients’ unique needs and our team of consultants who are focused exclusively on providing custom institutional services.

The National Association of Plan Advisors (NAPA) Top DC Advisor Teams listing focuses on firms (or in a wirehouse environment, 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, 2024, 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.

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.