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NEWS RELEASE

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BENEFIT FINANCIAL SERVICES GROUP (BFSG) TEAM MEMBERS NAMED AS 2025 PLANADVISER TOP RETIREMENT PLAN ADVISERS

IRVINE (March 28, 2025) – Benefit Financial Services Group (BFSG) is excited to announce that Tina Schackman, Chad Noorani, and Braden Priest were named as 2025 PLANADVISER Top Retirement Plan Advisers. The listing can be seen here: <https://www.planadviser.com/awards/2025-top-retirement-plan-advisers/?type=list&category=ALL>.

“BFSG serves as a fiduciary to our clients, which means we always strive to put our clients’ interest first. Our team-based approach ensures each of our clients has access to the knowledge and expertise of our experienced retirement and investment professionals. We are proud that our team is always looking for ways to better serve our clients and elevate the retirement industry. We are grateful to our loyal clients and dedicated professionals,” said Tina Schackman, CFA®, a Principal, and Senior Retirement Plan Consultant at BFSG.

The 2025 PLANADVISER Top Retirement Plan Advisers recognition is based solely on self-reported quantitative data about an adviser’s practice. To be included in this year’s list, advisers had to have a minimum of 50 plan clients or retirement plan assets under advisement of \$400 million or more, as of year-end 2024. After meeting the minimum plan or asset count, advisers are also highlighted if they meet the following criteria: 91% - 100% of clients that are 401(k) plan sponsors, or 10 or more 403(b), 457, nonqualified, DB, cash balance, SEP, SIMPLE or MEP/PEP plan clients. As this recognition is based solely on quantitative figures, there is no judging or subjective measurement, and it is not indicative of any adviser’s future performance. Neither advisory firms nor their employees pay a fee in exchange for this recognition. More information here: <https://www.planadviser.com/awards/2025-top-retirement-plan-advisers/>

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