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## NEWS RELEASE

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### **MICHAEL ALLBEE, CFP® MAKES THE FORBES/SHOOK BEST-IN-STATE WEALTH ADVISORS (2025)**

IRVINE (APRIL 10, 2025) – Benefit Financial Services Group (BFSG), a Registered Investment Advisor serving both institutional and individual clients, is pleased to announce that Michael Allbee, CFP®, has again made the seventh-annual Forbes/SHOOK Best-in-State Wealth Advisors list. Collectively, the advisors on the Forbes/SHOOK Best-in-State Wealth Advisors list oversee more than \$16.7 trillion in client assets and stand out for their track record in navigating uncertain times. The full list 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 personalized client experience to the successful families and growing financial institutions that rely on us.” said Michael Allbee, Partner and Senior Portfolio Manager of BFSG.

The Forbes ranking of America’s Top Wealth Advisors and Best-In-State Wealth Advisors, developed by [SHOOK Research](#), is based on an algorithm of qualitative criteria learned through telephone, virtual and in-person due diligence interviews, and quantitative data such as revenue trends and assets under management. The algorithm additionally weighs factors such as service models, compliance records and industry experience, and focuses on those that encompass best practices in their approach to working with clients. All advisors that are considered have a minimum of seven years’ experience. Portfolio performance is not a criterion due to varying client objectives and lack of audited data. Based on time period from 6/30/23 - 6/30/24. 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.*