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## NEWS RELEASE

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*For Immediate Release*

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### **BENEFIT FINANCIAL SERVICES GROUP (BFSG) NAMED ONE OF INVESTMENTNEWS “5-STAR WEALTH MANAGEMENT TEAMS” FOR 2025**

IRVINE (May 15, 2025) – Benefit Financial Services Group (BFSG Wealth Management), a multi-faceted registered investment advisory firm serving both institutional and individual clients, is pleased to announce it has been ranked by InvestmentNews (IN) as a “5-Star Wealth Management Teams” for 2025. The report can be seen [here](#).

InvestmentNews honored the top wealth management firms in America that excelled in growing and retaining clients. According to Investment News, what sets the 5-Star Wealth Management Teams 2025 apart is that the firms champion a collaborative culture over hierarchical rigidity, drawing strength not from a single figurehead, but from the collective. BFSG harnesses the combined strength of our wealth management and institutional teams to help achieve the goals of our clients.

Investors across the country were invited to nominate their advisory teams—defined as groups consisting of four or more advisors—and highlight the standout services that distinguished these teams. Key areas of focus included:

- Meaningful contributions to clients and the financial industry
- Deep understanding of client needs
- Notable impact achieved over the past 12 months
- Standout performance based on AUM and team results

The IN team carefully reviewed all nominations, evaluating how each advisory team made a significant difference for their clients and within the broader financial services industry.

*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.*