



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

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NAPA NAMES BFSG TO TOP DC ADVISOR TEAMS (2026)

IRVINE (April 3, 2026) – The National Association of Plan Advisors’ (NAPA) released the list of its Top Defined Contribution (DC) Advisor Teams for 2026 and Benefit Financial Services Group (BFSG) is pleased to announce we are among the nation’s leading retirement plan advisor firms with assets under advisement of at least \$100 million. This year’s list featured 373 teams representing 43 states and the District of Columbia.

Unlike other lists, this focuses on individual firms, or what may, in a wirehouse environment, be referred to as a team or office, and the assets under advisement related to their defined contribution (DC) practice, specifically in a single physical location. 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.

“Since their inception, NAPA’s various industry lists represent the best of what the retirement plan industry has to offer, setting the bar higher for financial professionals and plan advisors specifically,” said John Sullivan, Chief Content Officer of the American Retirement Association, and Editor-in-Chief of NAPA-Net, the nation’s leading online resource for retirement plan advisors. “The NAPA Top DC Advisor Teams are ranked by self-reported DC assets under advisement and highlight the positive impact they’re making on the nation’s private retirement system.”

Sullivan added, “As the nation’s voice for retirement plan advisors, we are once again pleased to highlight the contributions and commitment of these teams.”

The list of NAPA’s Top DC Advisor Teams, which will be published in the summer issue of NAPA Net, the Magazine, is available online at <https://www.napa-net.org/industry-content/accolades-home/napa-accolades-topdcadvisor-teams/napa-top-dc-advisor-teams-2026/>.

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.

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.