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NEWS RELEASE

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BENEFIT FINANCIAL SERVICES GROUP (BFSG) NAMED ONE OF BARRON'S "TOP 100 INSTITUTIONAL CONSULTING TEAMS" FOR 2026

IRVINE (May 16, 2026) – Benefit Financial Services Group (BFSG Institutional Services), a multi-faceted registered investment advisory firm serving both institutional and individual clients, is pleased to announce it has been ranked (#59) in Barron's again as a "Top 100 Institutional Consulting Teams" for 2026. The Barron's listing can be seen **here**.

Barron's published its first advisor ranking in 2004 to shine a spotlight on the nation's best wealth managers and raise standards in the industry. Many of the nation's top wealth management teams specialize in investing for large organizations—pension plans, university endowments, charitable foundations, and the like. These teams also serve individual investors, many of whom want institutional-style oversight of their investments. BFSG's Institutional Services team provides advisory services for retirement plans in both the public and private sectors.

"Through custom, process-driven strategies, we tailor our approach to clients' unique needs. BFSG has decades of experience helping plan sponsors build strong fiduciary governance structures to help lower risk and enhance retirement plan outcomes. And above all, every BFSG contract lists us as a fiduciary to the Plan." said Tina Schackman, a Principal, and Senior Retirement Plan Consultant at BFSG.

This annual ranking is performed by Barron's. Advisors who wish to be ranked must first pass a prequalification process aimed at ensuring that those in the mix are experienced and sophisticated advisors. Those who meet the criteria then fill out a survey with more than 100 questions about their practices. Barron's verifies the data with the advisors' firms and with regulatory databases and then they apply their rankings formula to the data to generate a ranking. The formula features three major categories of calculations: (1) Assets (2) Revenue (3) Quality of practice. In each of those categories they do multiple subcalculations. Barron's measures the growth of advisors' practices and their client retention. They also consider a wide range of qualitative factors, including the advisors' experience, their advanced degrees and industry designations, the size, shape, and diversity of their teams, their charitable and philanthropic work and, of course, their compliance records. More about the methodology can be found **here**.

<u>Disclaimer</u>: 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.