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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 2023

IRVINE (April 17, 2023) – 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 (#83) in Barron's again as a "Top 100 Institutional Consulting Teams" for 2023. The Barron's listing can be seen [here](#).

"BFSG Institutional Services serves as a fiduciary with every client and provides written acknowledgement of our fiduciary status. Our team-based approach ensures each of our clients has access to the knowledge and expertise of our experienced retirement and investment professionals. This accolade is a testament to both our expertise and commitment to our clients," said Darren Stewart, a Principal, and Senior Retirement Plan Consultant at BFSG.

This annual ranking is performed by Barron's. Registered Investment Advisors, Institutional Consultants, and Wealth Management Firms complete a questionnaire about their practice. Barron's verifies the data with the advisors' firms and with regulatory databases and then they apply their quantitative and qualitative measures to generate a ranking. The formula features three major categories of calculations: (1) Assets under management (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](#).

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.