Introducing Tiffany Benda Katz
February 2, 2026

We are pleased to introduce Tiffany Benda-Katz, who recently relocated to Napa with her family from the Los Angeles area to join the 5T Wealth team as Vice President of Family Office & Client Services.

Prior to joining 5T, Tiffany held several senior roles at Capital Group in Los Angeles, one of the world's oldest and largest asset managers, founded in 1931 with more than $3 trillion in assets under management. Most recently, she served as Vice President, Client Relationship

Manager. Her experience spans high-net-worth and institutional relationship management, supporting individuals, families, trusts, foundations, and endowments with a level of rigor and care typically found in large-scale asset management firms.

The addition of this role was both intentional and strategic. After two consecutive years of exceptional growth, we reached a point where scale required not only expanded advisory capacity, but a more deliberate investment in how the client experience is designed, delivered, and sustained.

Our growth in 2024 was driven largely by the acquisition of the client base of RG Advisors, LLC. In 2025, the firm's momentum continued through the focused execution and leadership of Jackie Lou Raquidan in her role as the Chief Growth Officer, strengthening our growth strategy, internal alignment, and operating cadence. Building on this foundation, we further expanded planning capacity with the addition of Colton Maher as Financial Planner and Advisor. Tiffany's role completes this intentional sequence, ensuring that as our advisory platform expands, our client experience evolves with equal discipline and care.

At 5T, extraordinary client service is not defined by frequency of contact or reactive problem-solving. It is proactive by design—anticipating needs, identifying risks early, and addressing issues before they escalate. Tiffany's mandate is to elevate and consistently deliver a disciplined, high standard of client experience across the firm, while preserving the personal, relationship-driven approach that defines 5T.

What further distinguishes Tiffany's role is the depth of her technical training—an uncommon strength in traditional client service functions. She holds a Personal Financial Planning (PFP) Certificate from UCLA, which qualifies her to sit for the CFP® examination. She has also completed all coursework aligned with the Series 65 license and would be required to pass the Series 65 examination should she choose to serve as an Investment Adviser Representative. Tiffany pursued this education intentionally, not to become an advisor, but to bring planning fluency, fiduciary awareness, and investment literacy directly into the client experience, allowing her to partner seamlessly with advisors while advocating for clients with uncommon insight. She also holds a Bachelor of Arts from Loyola Marymount University.

Originally from Sacramento, Tiffany is excited to return to Northern California with her husband, daughter, and rescue dog, Cooper. Outside of work, she is passionate about the arts and actively supports the creative community. She is also deeply committed to advocating for adults with developmental disabilities, a cause that is especially meaningful to her.

Grounded in self-reliance, driven by results, and devoted to teamwork and excellence, Tiffany is passionate about building enduring relationships and ensuring every client interaction reflects the high standards and thoughtful execution clients expect from 5T.

All the best to you,

Paul

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