POLJAK GROUP
WEALTH MANAGEMENT
At Steward Partners

Wealth Management with Personal Attention
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FOR IMMEDIATE RELEASE

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LOCAL LEADERS NAMED TO NATIONAL "ADVISORS TO WATCH" LIST

Shreveport, LA— Local wealth managers and partners Denis Poljak, Ph.D., CPM®, CFP® and Davor Poljak, M.B.A. and CPM® of Poljak Group Wealth Management at Steward Partners have recently been named to *AdvisorHub* Magazine's 2025 "Advisors to Watch" list.

A national quarterly news journal for financial advisors, *AdvisorHub* announced its fourth annual "1,000 Advisors to Watch" list. Winners included on the list are recognized for their sophisticated practices, year-over-year growth, scale and quality of practice, professionalism, community service, and character. Advisors must have a clean regulatory record and at least seven years of experience and $150 million in assets or more under management.

"This honor is especially meaningful to us as it reflects our resilient client relationships, dedication to providing exceptional service, and uncompromising commitment to the values that are at the core of who we are as advisors and partners to our clients," said Denis Poljak.

The Poljak brothers, who both serve as managing directors and wealth managers for Poljak Group Wealth Management, were also named recently to the 2025 *Forbes* "Best-In-State Wealth Advisors" list for best-in-class excellence in the wealth management industry for Louisiana.

The *AdvisorHub* list is broken into several sublists, including "RIAs" (fee-only advisors), "Over $1 Billion," "Under $1 Billion," "Next Gen," "Women," and "Solo" advisors to recognize the wide range of business models in the industry. Denis Poljak and Davor Poljak were named to "Advisors to Watch: Under $1 Billion in Assets Under Management" list.

"We're gratified for the trust our clients have in us to help protect and grow their wealth for future generations—and proud to be recognized by our industry peers for the strong values that guide our work every day," said Davor Poljak.

FOR FURTHER INFORMATION, VISIT: www.advisorhub.com.

ABOUT POLJAK GROUP WEALTH MANAGEMENT

Located in downtown Shreveport, Louisiana, the Poljak Group Wealth Management team of dedicated professionals specializes in multigenerational wealth and asset management, preservation and custom growth strategies with a personalized approach. Along with access to the world-class resources of independent financial services firms Steward Partners and Raymond James, Poljak Group Wealth Management provides wealth management needs, including retirement planning, legacy building, estate & tax planning strategies, portfolio creation and maintenance, and risk management. To learn more about Poljak Group Wealth Management, visit www.poljakgroup.com.

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ABOUT STEWARD PARTNERS

Representing some of the top advisors in the U.S., Steward Partners is a full-service, employee-owned, independent financial services firm that offers wealth management solutions for families, businesses, and multigenerational investors. Established in 2013, the firm fosters a positive, transparent culture of camaraderie and excellence that has fueled its substantial growth in a highly competitive industry. With its commitment to exceptional client service and forward-thinking partnerships, the firm was ranked as the #18 RIA in the country in Barron's Top 100 RIAs for the year 2024. Offering services such as comprehensive wealth planning, private banking, institutional consulting, and business solutions, the firm was responsible for over $40 billion in client assets as of January 2024. To learn more about Steward Partners, visit www.stewardpartners.com.

250 ADVISORS TO WATCH (UNDER $1B)

Source: AdvisorHub.Com. AdvisorHub: Advisors to Watch (Under $1B) ranking was developed by AdvisorHub and is based on Scope of practice measured by assets, production and level of service; Growth of practice consisting of year over year growth in assets, households and production; and lastly, Professionalism which includes regulatory record, community service and team diversity. Investment performance is not a criterion because client objectives and risk tolerances vary, and advisors rarely have audited performance reports. Rankings are based on the opinions of AdvisorHub and are not indicative of future performance or representative of any one client's experience. These advisors won by bringing in new clients, increasing assets, and boosting production. Participation is open to all firms and advisors. Nominees are required to have a minimum of seven years of experience, $100m minimum AUM, and a clean regulatory record. Using data on assets, households, and production, we rank advisors on three categories: scale, growth, and professionalism. Scale is the traditional metric used in most rankings. It's essentially the size of the business and its profitability. We also considered staffing, clientele, and several other factors. This in aggregate provides a snapshot of the size and sophistication of a practice. Neither Steward Partners Investment Solutions, LLC nor is Wealth Managers pay a fee to AdvisorHub in exchange for the ranking. For more information, see www.AdvisorHub.com.

FORBES BEST IN STATE WEALTH ADVISORS

2025-Source: Forbes.com – ranking was developed by SHOOK Research and is based on in-person, virtual and telephone due diligence meetings to evaluate each advisor qualitatively, a major component of a ranking algorithm that includes: client retention, industry experience, review of compliance records, firm nominations; and quantitative criteria, including: assets under management and revenue generated for their firms. Investment performance is not a criterion because client objectives and risk tolerances vary, and advisors rarely have audited performance reports. Rankings are based on the opinions of SHOOK Research, LLC and are not indicative of future performance or representative of any one client's experience. Neither Steward Partners Investment Solutions, LLC nor its Wealth Managers pay a fee to Forbes or SHOOK Research in exchange for the ranking. For more information, see www.SHOOKresearch.com.

BARRON'S TOP 100 RIA FIRMS

2024 – Source: Barron's is a registered trademark of Dow Jones & Company, L.P. All rights reserved. Participation in this ranking is by invitation only and limited to firms that meet the minimum eligibility requirements. Barron's selected firms that mange 2% or more of the total assets of all ranking applicants. This year, that creates a threshold of $70 billion in assets. Participating firms were evaluated and ranked on a wide range of quantitative and qualitative data, including: assets overseen by the firm, revenue generated by the firm, level of technology spending, number of clients, size of staff, diversity across staff, and placement of a

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succession plan. The ranking may not be representative of any one client[s experience, is not an endorsement, and is not indicative of the advisor's future performance. Neither Steward Partners nor any of its Financial Advisors pay a fee in exchange for this award/rating. Barron's is not affiliated with Steward Partners.

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