BIZ.MAGAZINE DAILY NEWS REPORT

written by BIZ Magazine | May 2, 2025

POLJAK GROUP
WEALTH MANAGEMENT
At Steward Partners

Forbes 2025 "Best-in-State Wealth Advisors" List Names Denis and Davor Poljak of Poljak Group Wealth Management for Louisiana

Shreveport, LA–April 29, 2024–Poljak Group Wealth Management at Steward Partners has announced wealth managers and partners Denis Poljak, Ph.D., CPM®, CFP® and Davor Poljak, M.B.A. and CPM® have been named to the 2025 Forbes "Best-In-State Wealth Advisors" list.

The Forbes "Best-In-State Wealth Advisors" annual list ranks advisors based on a variety of factors, including research, interviews, and an algorithm of qualitative and quantitative data.

"We appreciate Forbes for recognizing our work that we consider a great privilege—helping our clients, including generations of families, chart their financial course with portfolios that perform to help create their legacy," said Denis Poljak.

According to Davor Poljak, "It is meaningful to us to be acknowledged for all we do daily to help our clients preserve and grow their wealth. We care for our clients like we do our own family; the personal attention we give helps ensure their long-term success."

The Poljak brothers, co-founders and principals of Poljak Group Wealth Management, have been named to the Forbes "Best-In-State Wealth Advisors" list in previous years for best-in-class excellence in Louisiana's wealth management industry. Denis was selected by Forbes in 2019, 2020, 2021, 2023, and 2024. Davor Poljak has previously been honored on the Forbes list in 2021 and 2024.

FOR THE FULL LIST AND FURTHER INFORMATION, VISIT:
www.forbes.com/lists/best-in-state-wealth-advisors

Source: Forbes.com Forbes Best-in-State Wealth Advisors 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 nor its Wealth Managers pay a fee to Forbes or SHOOK Research in exchange for the ranking. For more information, see www.SHOOKresearch.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.

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.