Wealth Management
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Morgan Stanley

Ph.D. CFP®. CIMA®. CPM®.
THESE CREDENTIALS COUNT.

When it comes to wealth management for your family, these credentials — combined with our team's education and more than two decades of experience — set us apart.

At King Poljak Group at Morgan Stanley, most of our client relationships extend from generation to generation for a reason: our extensive multi-generational wealth management, preservation and transfer; experience; education; and leading industry credentials help our select clients achieve their financial goals. And to us, that's what counts the most.

We take pride in our personalized approach to wealth management, and are committed to continually advancing our credentials and knowledge to help you identify and reach your most important objectives. Our custom strategies are designed specifically with you, for you.

- Senior Vice President, Wealth Advisor, and Portfolio Management Director, Denis Poljak, holds a PhD in Economics.
- With Denis' Certified Financial Planner (CFP®), Certified Investment Management Analyst (CIMA®) earned from the University of Pennsylvania's Wharton School of Business, and Certified Portfolio Manager (CPM®) designations, he is one of the most credentialed wealth advisors in the industry nationwide.
- Denis Poljak and Davor Poljak both earned the prestigious CPM® designation from Columbia University in New York, and, as a family business, are dedicated to helping families as they would their own families in reaching their financial goals.
- The team at King Poljak Group at Morgan Stanley, led by financial advisors John King, Denis Poljak and Davor Poljak, offers extensive experience in helping select clients address their wealth management needs.

With King Poljak Group, you will have the personal attention you expect from a local team of dedicated financial professionals, along with access to the vast resources of Morgan Stanley— one of the world's most respected financial services firms.

Whatever your challenges, we can help you surmount them with a cohesive plan that reflects your unique circumstances, timeframe, and risk tolerance. Call us today and let us put our credentials, experience and education to work for you and your family — for generations to come.