Generational Wealth Advisors Honored by *D Magazine* as a 2025 Top Wealth Manager

Generational Wealth Advisors (GWA) has once again been recognized by *D Magazine* as a Top Wealth Manager, marking the 15th time the firm has received the award. Each year, *D Magazine* highlights top-performing wealth management firms in the Dallas–Fort Worth area based on their commitment to fiduciary duty, client service, and professional integrity.

In addition, Stephen Hart, CFP®, CEPA, Director of Financial Planning and Senior Wealth Advisor, has been named a *D Magazine's* 2025 Best Financial Planner—his fifth appearance on this list.

Every CERTIFIED FINANCIAL PLANNER™ in the Dallas–Fort Worth chapter of the Financial Planning Association was invited to participate in the voting process, nominating peers both inside and outside their firms. A panel of experienced local financial planners reviewed the results before determining the final list.

"It's an honor for our firm to be recognized by *D Magazine* for a 15th time," said Brent Everett, Founder and CIO of Generational Wealth Advisors. "This acknowledgment reflects the hard work and integrity of our team and their commitment to serve clients with care."

As part of Generational Group—one of North America's leading middle-market investment banking firms—GWA provides business owners with comprehensive wealth management and pre-exit planning strategies. The firm assists clients in developing customized financial plans that align with long-term goals, optimize tax efficiency, and prepare for life after a business transition. In addition, GWA designs and manages investment portfolios with a focus on growth, preservation, and risk management.

Ryan Binkley, President and CEO of Generational Group, added: "The GWA team's commitment to their clients' success is outstanding. Their thoughtful approach to financial planning and investment management exemplifies the values that define our organization. Congratulations also to Stephen Hart for being named among *D Magazine's* Best Financial Planners for 2025. His professionalism and leadership make him an invaluable part of the Generational team."

For more information regarding GWA, please contact Gina Aldaz, Managing Director of Client Development, at galdaz@generationalwealthadv.com.

About Generational Wealth Advisors

Generational Wealth Advisors is an award-winning wealth management firm based in Texas that serves a national client base. Their team of financial professionals delivers independent and objective advice. They work on behalf of their clients and make decisions based on their needs, not on incentives to favor a particular strategy, asset class, fund manager, or service provider. Their strategies focus on what has been proven, over time, to produce results.

Generational Wealth Advisors is an independent Registered Investment Advisor regulated by the United States Securities and Exchange Commission and does not provide legal or tax advice. Please see important disclosure information, including details on award methodology, at: www.generationalwealthadv.com/disclosure-information.

About Generational Group

Generational Group, headquartered in Dallas, TX, is a leading, award-winning full-service M&A advisory firm. Generational has over 300 professionals across 16 offices in North America. The firm empowers business owners to unlock the full value of their companies through a comprehensive suite of services—including strategic growth consulting, exit planning education, business valuation, value enhancement strategies, M&A advisory, digital solutions, and wealth management.

Celebrating its 20th year, Generational has successfully closed over 1,700 transactions and has ranked #1 or #2 in all LSEG league tables for deals valued between $25 million and $1 billion in 2022, 2023, and 2024.

The firm was named **2024 USA Investment Banking Firm of the Year** by the Global M&A Network and recognized as **Investment Banking Firm of the Year** by The M&A Advisor in both 2022 and 2024.

Award Disclosure – 2025 *D Magazine*

Top Wealth Managers
D Magazine invited every wealth management firm and team in the Dallas–Fort Worth chapters of the Financial Planning Association, the Chartered Financial Analyst Institute, and the Investments & Wealth Institute to share information about their practices. To qualify, firms or teams must have at least $100 million in total assets under management for individual clients, average client assets of $1 million or more, a 95 percent client retention rate over the last two years, and no current disciplinary actions. Firms must also have been in existence for at least five years as of the application deadline and must act as fiduciaries for their clients with a written disclosure.

Best Financial Planners

D Magazine asked every CERTIFIED FINANCIAL PLANNER™ professional in the Dallas–Fort Worth chapter of the Financial Planning Association to cast online ballots. CFP® professionals were asked to nominate peers they consider to be among the most skilled and experienced in the profession. Outside-firm votes carried more weight than inside-firm votes, self-nominations were not allowed, and a panel of local financial planners reviewed the final list.

Third-party rankings and recognition from rating services or publications are no guarantee of future investment success. Working with a highly rated advisor does not ensure that a client or prospective client will experience a higher level of performance or results. These ratings should not be construed as an endorsement of the advisor or by any client nor are they representative of any one client's evaluation. Generally, ratings, rankings and recognition are based on information prepared and submitted by the advisor. Unless otherwise noted no fee was paid for consideration of any ranking or award.