

Member News

Dan Palm Recognized By Forbes Magazine As One Of The Best-In-State Wealth Advisors

Forbes, in partnership with SHOOK Research, announced the 2023 list of America's Top Wealth Advisors in April 2023, which spotlights the country's most successful financial leaders, who continue to thrive despite the global financial turmoil. The 7,321 advisors on this year's list collectively manage nearly \$11 trillion in assets.

This year's list includes 250 wealth managers, who oversee \$1.3 trillion in client assets. Advisors were nominated by their firm and then vetted and ranked by SHOOK research.

Dan Palm, of The Palm Group, a part of Robert W. Baird & Co and proud Chamber member was recognized as a Forbes Best-In-State Wealth Advisor. "It's always nice to get recognized for the second year in a row as I made the Forbes list for best advisors in the state of Colorado," said Dan Palm, Senior Vice President, The Palm Group. "It was a nice honor to get but it is certainly not something I get by myself. We have a lot of partners and teammates that all make us look good."

"Current clients appreciate the work that we do," said Palm. "They always think it is cool when their advisors get recognized on a national or statewide recommendation like that. Usually what happens is when we get these awards, a referral or two comes our way because our clients are proud of the people they work with."

Palm is proud to carry on his dad Rick's legacy. Rick Palm retired after a 38-year career with Baird Capital and Dan Palm,

who interned with Baird during college and joined The Palm Group after graduating, stepped in to take the reins. "While it wasn't pre-ordained that my dad and I were going to work together, I had a front row seat to watching his career evolve," said Palm. "Over his 38-year career, I got to see him evolve from stock broker to financial advisor to wealth manager. What I was drawn to were the relationships that he developed. Some of his best friends turned into the best clients and vice versa. It's rare to find the continuity of the relationship tenure that you have in this industry. We work with families for decades, not just a quarter or a project."

"With recession fears front and center, thanks to recent bank failures and ongoing rate hikes from the Federal Reserve, the steady hand of a seasoned financial advisor is needed now more than ever," said Sergei Klebnikov, Staff Writer, Forbes.

The Palm Group has over 70 years of combined experience and boasts the highest recognized designations in the industry. Palm holds the CFP® & CPWA® designations, Julia Stelloh holds the CPA/PFS & MBA designations, and Chase Moore also holds the CFP® designation. Less than 1% of wealth management firms have a CPA on staff which makes The Palm Group



Top Advisor: Dan Palm, Senior Vice President | The Palm Group.

unique in the industry.

"It's incredibly beneficial to the clients," said Julia Stelloh, CPA/PFS, MBA, Vice President. "Most clients don't like to pay taxes. I will help them make decisions on how they save for retirement and how they spend their money. It makes a big impact on how much they have."

On top of their technical prowess, The Palm Group is also trained in Family



Wealth Dynamics and Investor Psychology to round out the human side of their practice. They are confident that they will be able to meet your needs with both numbers and empathy.

The Palm Group, a part of Robert W. Baird & Co, is located at 210 University Boulevard, Suite 800, in Denver. For more information, visit www.bairdfinancialadvisor.com/palm.

Marlena Design Group: Passionate And Professional Interior Designers

Marlena Design Group is a creative and full-service interior design team that helps plan, build, decorate, design, and transform a space. Whether your project is a new build, remodel, or home décor, Marlena Design Group can offer you peace of mind with interior design expertise, thorough methods, and custom project packages.

Marlena Carson, the owner, has been doing interior design for over 15 years and has had her own company for five years. A Colorado native, and a graduate of the Art Institute of Colorado with a BA in Interior Design, Carson began her career at an architectural lighting firm, where she quickly realized her particular mastery of lighting design. From there she moved into luxury showrooms and honed her eye for details and quality materials.

She has built a strong partnership with the local ASID chapter and is well respected in the design community. It was a natural progression to start her own company. Another partnership Carson is excited to be part of is the Greater Glendale Chamber of Commerce. "It was perfect timing for me to join the Chamber," said Carson. "The Glendale community has a special place in my heart and I am so excited to reconnect and be a part of this group. All of the events have been really fun and everyone is super nice and supportive."



Marlena Design Group has experience with designing everything you can imagine inside the home from kitchen and baths to any living space. "We do everything from simple paint consultations all the way up to assisting our clients to build custom homes," said Carson. "And we do everything in between such as remodels, furniture packages, home décor packages that include artwork, accessories, rugs,

lighting, and all the pretty stuff."

Creating beautiful and custom spaces that meet and exceed their client's highest expectations is the priority and goal. Marlena Design Group strives to personalize the homes of the clients whose lives they are inspired by.

Marlena Design Group (ASID, NKBA, CCE) consists of creative talents pulled from the industries of interior design, construction, and personal styling. They combine a wide variety of experiences and specialties to create fresh, custom interiors for residential and commercial spaces.

The first step in the process is to schedule a free phone call that may last 20 or 30 minutes. This allows Carson to get a better idea of what the needs, expectations, and budget are. "We hear a lot of different topics like moving into a new house or we have lived in this house for a really long time so we're ready to remodel, or other life circumstances like a flood or fire," said Carson. Usually there is something in someone's life that is changing which prompts them to reach out to an interior designer. They are also most likely too busy to take on the project themselves."



Marlena Carson



Ironwood Place: Marlena Design Group assisted with the remodel of this unique 1960s home that sits on a lake in Broomfield. They gutted the main level and then designed and built a brand-new fireplace and kitchen. They installed dark espresso hardwood flooring throughout. For furniture and decor, they went for a coastal chic, modern look.

New builds, remodels, and home additions are Marlena Design Group's passion. They assist homeowners, builders, and investors with any construction project. They help design, select, specify, and manage all interior and exterior finishes for your project. "I am going to take the time to get to know my clients and get to know their family," said Carson. "I want to find out how they live and also find out what they like and don't like stylistically and what color palettes they love. If I am working with partners or a pair of homeowners, I am getting to know them individually and literally marrying their two styles together. I am putting both of their personalities into their space."

Home decor is a vital part of any good interior design. Marlena Design Group has access to over 200 vendors that include upholstery, case goods, lighting, textiles, wall finishes, window treatments, and accessory packages for any home or office.

They also help execute your kitchen and bath project. Marlena Design Group has many years of training in cabinets, appli-

ances, countertops, plumbing, tile, hardware, and waterproofing systems.

Once the initial meet and greet is complete, the process remains simple. The client provides photos and measurements of their space and Marlena Design Group will design a quiz and a questionnaire to get a feel for your preferred style and color palette. They will then curate a list of suggestions for furniture, rugs, and accessories. You will receive a scaled floor plan that includes the new furniture layout and 3D room renderings with instructions on where to place all the new items, all sent via email.

Marlena Design Group will have a booth for the seventh year in a row at the Colorado Garden and Home Show from February 24, 2024, to March 3, 2024. Marlena Design Group attracts 40% of her business from people who visit the booth. For more information, visit www.coloradogardenfoundation.org.

Marlena Design Group is located at 100 S. Madsion Street in Denver. For more information, visit www.marlenadesigngroup.com.