

## PEOPLE ON THE MOVE

## *Polstra uses finance skills in mission work*

BY WILL ROBINSON

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**Dave Polstra, co-founder and partner of Brightworth, has used his finance skills to help a ministry become debt free. <sup>(1)</sup>**

JOANN VITELLI

Dave Polstra's boss told him 35 years ago that he would never make it in the world of financial planning. Now the wealth management firm Polstra co-founded, Brightworth, manages more than \$1.2 billion for more than 500 clients.

Polstra began his career as a tax accountant at Arthur Andersen LLP, but felt unfulfilled in the tax world.

"I wanted to do more than help with taxes," said Polstra. "I wanted to help with all financial needs."

Supported for three years solely by the salary of his wife Betsy, then a nurse at Grady Hospital, Polstra made the leap from tax accountant to financial planner. Polstra, a self-described introvert, struggled at first. Following in the footsteps of his father, Polstra joined a Toastmaster's Club, an organization that aims to improve members' public speaking skills.

"It allowed me to start teaching retirement planning workshops," said Polstra.

In 1988, Polstra began teaching retirement workshops at The Coca-Cola Co. This was a turning point for Polstra, who found opportunities to help retiring executives plan their retirements and manage their wealth. Polstra said that even today, many of Brightworth's clients work or formerly worked for Coca-Cola.

In 1997, Polstra co-founded Polstra & Dardaman LLC with Chris Dardaman, whom Polstra had worked with since 1992. In 2005, the firm was renamed Brightworth.

“We wanted to start a firm that provided consistent, enterprise-level advice to clients, and we wanted that advice to be objective, independent and the same level we would want our mothers to receive,” said Polstra.

Brightworth now has nine partners and in 2015 was named by the *Financial Times* as one of the 300 Top Registered Investment Advisors.<sup>(2)</sup> The firm ranks 21<sup>st</sup> out of Atlanta’s top 25 money managers in discretionary assets under management, according to the 2015-2016 *Book of Lists*.<sup>(3)</sup>

Polstra is a leader outside of his firm as well. He is president-elect of the Atlanta Estate Planning Council and a board member for Eagle Ranch Children’s Home, among many other organizational memberships. However, most dear to his heart is his role as chairman for U.S. Operations for Medical Missions Ministries, an organization that provides free medical care to remote areas of Guatemala.

Polstra’s first encounter with the ministry was in 1990 when he hosted a Guatemalan missionary doctor, Hermann Alb, in his home so that Alb could attend a missionary conference put on by Perimeter Church in Atlanta. Over the course of the week, Polstra and Alb became friends, and the two remain close today. Alb invited the Polstras to stay at his home in Guatemala and encouraged them to take part in the ministry’s work there.

The next year, Polstra took part in Perimeter Church’s first team to Guatemala for a weeklong trip. Unlike his wife, whose nursing experience lent itself to a medical mission trip, Polstra struggled to find a role in Guatemala.

“I felt useless and underutilized,” he said. “I’m a financial planner loading medicine onto four wheelers.”

Back in America, Polstra still felt moved by the poverty he had seen in Guatemala. More than half of the country lives below the poverty line, while nearly half of Guatemalan children younger than five are chronically malnourished, according to the CIA World Factbook.

It dawned on Polstra that whereas Alb was a capable doctor with little administrative skills, Polstra was a capable administrator with no medical skills. He seized the opportunity for partnership and brought his financial expertise to the assistance of the fledgling ministry.

“Today [Medical Missions Ministries is] debt free. We have a ministry center that sleeps 50 people, eight four-wheel-drive Suburbans, four full-time doctors, a pharmacist, a dentist and translators,” said Polstra.<sup>(1)</sup>

## DAVE POLSTRA

**Age:** 59

**Born in:** Springfield, Ohio

**Lives in:** Johns Creek

**Current job:** Co-founder and partner, Brightworth

**Previous job:** CPA, Arthur Andersen LLP

**Education:** B.A., University of Texas

**Family:** Wife, Betsy; three adult children

**Hobbies:** Waterskiing and wake surfing

In addition to providing free medical clinics at approximately 100 churches, the ministry now teaches business practices, welding skills and more. It also helped open a Christian school that serves 260 students in Escuintla, a crime-plagued city in Guatemala.



Brad Slaten, who has worked on the Medical Missions Ministries' board with Polstra since 1994, said Polstra is responsible for millions of dollars of the ministry's fundraising.<sup>(1)</sup>

"This is a huge contribution for Dave," said Slaten, "because he facilitated a lot of [the fundraising]."<sup>(1)</sup>

For his work with Medical Missions Ministries, Polstra won the 2011 Global Impact Award from Invest in Others. The award came with \$20,000 for the ministry. Polstra and his wife have returned to Guatemala more than 30 times.

Whether working for Brightworth's clients or Guatemalan medical missionaries, Polstra applies the same brand of personal service.

To see Dave's bio, please click [here](#).

To learn more about the services provided by Brightworth, please click [here](#).

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(1) Neither Brad Slaten nor Medical Mission Ministries is a client of Dave Polstra or Brightworth.

(2) FT 300 is based on data gathered from RIA firms, regulatory disclosures, and the FT's research. As identified by the FT, the listing reflected each practice's performance in six primary areas, including assets under management, asset growth, compliance record, years in existence, credentials and accessibility. Neither the RIA firms nor their employees pay a fee to The Financial Times in exchange for inclusion in the FT 300.

(3) 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 by any client nor are they representative of any one clients' evaluation. Generally, ratings, rankings, and recognition are based on information prepared and submitted by the advisor. A more thorough disclosure of the criteria used in any of these rankings can be provided upon request.

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