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# PRESS RELEASE

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## **InVestra Earns LPL Presidents Club Recognition Again, Reinforcing Commitment to Client-Centered Growth**

**Jacksonville, FL — May 4, 2026 —** InVestra Financial has once again achieved **Presidents Club recognition at LPL Financial**, marking a continued milestone of excellence for the firm and its team.

This repeat recognition underscores the firm's consistent performance, dedication to client service, and strong partnership with its Registered Investment Advisor (RIA), Visionary Square.

“We deeply value our partnership with LPL and Visionary Square and are honored by this recognition,” the firm shared in a recent announcement. “This achievement reflects the commitment of our team and the trust placed in us by the families we serve.”

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## **A Continued Focus on Excellence and Growth**

Operating a successful financial planning and wealth management firm requires sustained discipline, collaboration, and a client-first mindset. InVestra attributes its success to both its internal team and the clients who rely on its expertise.

Looking ahead to **2026 and beyond**, the firm outlined key strategic priorities, including:

- **Maintaining a strong client-first focus** for both existing and prospective clients
  - **Thoughtful and intentional growth** aligned with long-term objectives
  - **Expanding talent within the organization** to enhance service capabilities
  - **Strengthening partnerships** that support sustainable success
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## **Gratitude to Clients and Community**

InVestra emphasized that this achievement would not be possible without the continued support of its clients and referral network.

“We are grateful to everyone who continues to trust us and refer others to our firm,” the team stated. “We see you, and we appreciate you.”

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## **About InVestra**

InVestra is a financial planning and wealth management firm dedicated to helping individuals and families achieve long-term financial success. Through strategic partnerships and a client-centered approach, the firm provides comprehensive financial guidance tailored to each client’s goals.

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