

Advisor Recruiting Report for

InVestra

Executive Summary

InVestra is positioned unusually well for advisor recruiting because it sits in a highly attractive niche:

- independent wealth management,
- executive-focused planning,
- high-complexity clientele,
- boutique culture,
- and founder-led differentiation.

The firm's biggest recruiting opportunity is not competing against wirehouses on payouts. It is competing on:

- autonomy,
- sophistication,
- brand positioning,
- culture,
- and long-term enterprise participation.

Based on public positioning, InVestra already has several strategic recruiting advantages:

- executive compensation expertise,
- integrated planning,
- strong Jacksonville market positioning,
- boutique independence,
- and visible founder credibility. ([InVestra Financial](#))

The best growth path is likely:

1. recruit experienced relationship-driven advisors;
2. build a next-generation advisor bench;
3. institutionalize client relationships;
4. layer phantom equity selectively;
5. eventually transition select leaders into real ownership.

1. Current Strategic Position

InVestra's Market Position

Public-facing materials show InVestra differentiates through:

- executive compensation planning,
- equity concentration strategies,
- liquidity engineering,
- integrated wealth planning,
- and high-touch client service. ([InVestra Financial](#))

That positioning matters enormously in recruiting because:

- sophisticated advisors want differentiated firms;
 - top advisors increasingly avoid “commodity planning” firms;
 - elite advisors prefer firms with a clear market identity.
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2. Recruiting Environment in Wealth Management

Current Industry Reality

The advisor recruiting market is highly competitive because:

- the average advisor age remains high;
- succession shortages are severe;
- consolidation is accelerating;
- private equity is driving valuations higher;
- independent channels are growing rapidly. ([Barron's](#))

The best advisors today typically want:

- autonomy,
- stronger economics,
- succession opportunities,
- fewer compliance burdens,
- flexible branding,
- and better quality of life.

This favors independent wealth management firms over traditional wirehouses.

3. InVestra's Recruiting Advantages

A. Boutique Independence

This is a major advantage.

Many experienced advisors are leaving:

- Merrill,
- Morgan Stanley,
- UBS,
- Wells Fargo,
- and regional broker-dealers

because they want:

- more freedom,
- less bureaucracy,
- and stronger client ownership.

InVestra can position itself as:

“institutional-quality planning with entrepreneurial flexibility.”

B. Executive-Focused Niche

This is unusually valuable.

Most firms market generic retirement planning.

InVestra appears positioned toward:

- executives,
- concentrated equity holders,
- liquidity events,
- and complex planning. ([InVestra Financial](#))

That niche attracts:

- more sophisticated advisors,
- higher revenue households,
- and stronger referral ecosystems.

C. Founder Credibility

Public recognition and industry visibility help recruiting materially. ([LinkedIn](#))

Advisors often join firms because:

- they trust leadership,
- they respect production success,
- and they believe the founder can scale.

D. Jacksonville Advantage

Jacksonville is attractive because:

- lower operating costs,
- growing affluent population,
- business migration into Florida,
- favorable tax environment,
- and quality-of-life advantages.

This creates recruiting leverage versus:

- New York,
- Chicago,
- California,
- and Northeast firms.

4. Biggest Recruiting Threats

Wirehouse Transition Packages

Major firms still offer:

- upfront recruiting deals,
- forgivable loans,
- transition support,
- and massive infrastructure.

InVestra likely cannot outbid them directly.

So recruiting strategy should NOT be payout-first.

Private Equity Aggregators

PE-backed firms now aggressively recruit advisors using:

- equity rollovers,
- liquidity events,
- platform scale,
- and succession financing. ([Barron's](#))

This is probably the largest long-term competitive threat.

Advisor Portability Risk

Relationship-driven advisors can leave and move assets.

That means:

- restrictive covenants,
- retention economics,
- and culture

matter enormously.

5. Recommended Recruiting Model

Tier 1 — Experienced Advisors

Target:

- \$25M–\$250M books
- age 35–55
- client-retention-oriented
- planning-centric
- dissatisfied with bureaucracy

Ideal recruits:

- regional broker advisors,
- independent breakaways,
- boutique team lift-outs,
- second-chair advisors.

Recruiting message:

- independence,
 - planning sophistication,
 - culture,
 - long-term enterprise participation,
 - succession support.
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Tier 2 — Next-Generation Advisors

This is probably the highest ROI strategy long-term.

Target:

- CFPs,
- CPWAs,
- high-performing associate advisors,
- planners at larger firms,
- younger advisors frustrated by lack of advancement.

Public positioning around women's wealth and executive planning is especially attractive for recruiting emerging talent. ([InVestra Financial](#))

Tier 3 — Strategic Acqui-Hires

Acquire:

- retiring advisors,
- succession-challenged practices,
- lifestyle firms,
- solo practitioners.

This can accelerate AUM growth dramatically.

6. Compensation Recommendations

Recommended Structure

Component	Purpose
Competitive cash comp	Stability
Production payout	Short-term incentive
Phantom equity	Long-term retention
Transition equity opportunities	Succession
Retention bonuses	Asset stickiness

7. Phantom Equity Strategy

Your phantom structure should target:

- top producers,
- next-generation leaders,
- operators,
- and future succession candidates.

Do NOT broadly distribute phantom equity.

The most effective model is:

- selective,
 - highly performance-driven,
 - and tied to enterprise growth.
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8. Recruiting Messaging Strategy

Messaging Should Emphasize

Independence

Not corporate bureaucracy.

Sophistication

Executive-focused planning.

Long-Term Wealth Creation

Not just payout grids.

Career Path

Not “eat what you kill.”

Stability + Growth

Boutique but scaling.

9. Recruiting Infrastructure Recommendations

Build:

- advisor recruiting funnel,
 - referral recruiting network,
 - transition support system,
 - recruiting deck,
 - compensation architecture,
 - onboarding system,
 - succession roadmap.
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10. Most Important Strategic Insight

The biggest long-term risk to independent wealth firms is:

remaining founder-centric.

The firms that become truly valuable enterprises:

- institutionalize relationships,

- develop multiple rainmakers,
- build operational infrastructure,
- and create internal succession.

Recruiting is therefore not merely growth.
It is enterprise-value creation.

11. Recommended Immediate Actions

Next 12 Months

Priority 1

Recruit 1–2 experienced advisors.

Priority 2

Hire and train 2–3 next-generation planners.

Priority 3

Implement phantom equity selectively.

Priority 4

Build advisor transition playbook.

Priority 5

Create acquisition criteria for retiring advisors.

12. Overall Strategic Assessment

InVestra appears positioned to recruit successfully because it combines:

- boutique flexibility,
- sophisticated planning,
- executive-focused differentiation,
- founder credibility,

- and Florida market advantages.

The highest-probability path to major enterprise growth is likely:

1. targeted advisor recruiting,
2. institutionalized planning systems,
3. selective phantom equity,
4. internal succession,
5. and eventual strategic acquisitions.

That combination is how independent wealth management firms evolve from:

founder-led practices

to

durable multi-advisor enterprises.