

To join the team at InVestra, the key traits and skill sets appear to center around a blend of technical financial expertise, relationship-building ability, long-term thinking, and a client-first mindset.

Based on the company's messaging, leadership profiles, and public positioning, here's what they likely value most:

Core Traits

1. Relationship-Oriented Mindset

InVestra repeatedly emphasizes partnership, stewardship, and multi-generational client relationships rather than transactional financial advising. They appear to want people who:

- Build trust naturally
- Communicate with empathy and clarity
- Can guide clients through emotional financial decisions
- Value long-term relationships over short-term wins

Their positioning focuses heavily on helping families preserve “clarity, alignment, and continuity across generations.” ([LinkedIn](#))

2. Strategic and Long-Term Thinking

The firm emphasizes legacy planning, estate strategy, business succession, and comprehensive wealth management. Successful team members likely:

- Think holistically rather than narrowly
- Understand long-range planning
- Can connect investments, taxes, estate planning, and risk management into one strategy
- Are proactive problem-solvers

This is especially important because InVestra markets itself as more than an investment manager — closer to a “family office” partner. ([Columbia Metropolitan Magazine](#))

3. Educational and Advisory Communication

A major part of their public content is financial education and client empowerment. Their advisors regularly publish insights about:

- Financial literacy
- Market education

- Family finance
- Women and wealth
- Retirement and succession planning

That suggests they value people who:

- Explain complex topics simply
- Enjoy teaching clients
- Create confidence through communication
- Are comfortable presenting, writing, or advising publicly

[\(LinkedIn\)](#)

4. Professionalism and High Emotional Intelligence

Because they work with high-net-worth families and business owners, interpersonal maturity matters heavily. Important soft skills likely include:

- Discretion
- Composure
- Listening ability
- Attention to detail
- Client service orientation
- Team collaboration

Their emphasis on “operational excellence” and boutique client experience reinforces this.

[\(LinkedIn\)](#)

Important Technical Skill Sets

Financial Planning Expertise

Strong knowledge in:

- Retirement planning
- Investment management
- Estate planning
- Risk management
- Tax-efficient planning
- Business succession

These are all highlighted service areas on their website. ([InVestra Financial](#))

Industry Credentials

Their team prominently highlights certifications such as:

- CFP® (Certified Financial Planner)
- CPFA®
- CEPA®
- AIF®
- CDFA®
- ChFC®

That suggests credentials and continuing education are highly respected internally. ([Columbia Metropolitan Magazine](#))

Client Management and Advisory Skills

Likely valuable capabilities include:

- Financial plan creation
 - Portfolio reviews
 - CRM management
 - Wealth strategy presentations
 - Client onboarding
 - Risk assessment
 - Meeting facilitation
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Collaboration Skills

InVestra describes itself as a “team of specialists” delivering integrated advice. ([LinkedIn](#))

That means they probably favor candidates who:

- Work cross-functionally
 - Share information well
 - Operate without ego
 - Coordinate effectively across specialties
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Cultural Fit Indicators

Someone likely to thrive there would probably be:

- Calm under pressure
 - Service-driven
 - Organized
 - Analytical but personable
 - Comfortable with affluent clients
 - Interested in legacy and family impact
 - Passionate about financial education
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If You Were Preparing to Apply

The strongest positioning would likely include:

- Demonstrated client-facing experience
- Evidence of trust-building and communication
- Financial certifications or progress toward them
- Experience handling complex financial situations
- Examples of leadership, education, or advisory work
- A philosophy aligned with stewardship and long-term planning