Stephanie Vokral, CFP®, AIF®, CDFA®

Introducing Stephanie Vokral: Your Private Wealth Advisor

At InVestra, exceptional wealth management is built on strong leadership and meaningful client relationships. As Lead Private Wealth Advisor of our Columbia, South Carolina office, Stephanie Vokral brings more than 26 years of experience guiding individuals and families through the financial planning process with clarity and confidence.

Stephanie leads the Columbia branch with a steady, client-centered approach — combining technical expertise with thoughtful strategy to help families align their wealth with their values and long-term vision. Her mission is simple: replace financial stress with informed, empowered decision-making.

Distinguished Expertise & Thoughtful Strategy

As a Certified Financial Planner™ professional, Stephanie delivers comprehensive wealth planning that integrates every aspect of her clients' financial lives, including retirement income and distribution planning, investment strategy and portfolio design, tax-efficient planning, estate and legacy coordination, risk management strategies, and education planning. As a financial planner, she answers her clients' financial questions: When should I take Social Security? How should I structure my estate plan or the sale of my business for tax efficiencies? Can I afford to be my parents' caregiver or is there a better option? What are the tax implications of my RSUs?

Stephanie also holds the Accredited Investment Fiduciary® designation, equipping her to guide retirement plan sponsors and board members in fulfilling their fiduciary responsibilities with excellence and integrity.

Additionally, as a Certified Divorce Financial Analyst®, she brings specialized insight to clients navigating significant financial transitions. Over the years, she has worked with dozens of clients to prepare their Financial Affidavits for court and advised on property settlement issues.

Focused on Multi-Generational Wealth

Stephanie is deeply committed to helping families think beyond the present — building financial strategies that serve not just today's needs, but tomorrow's generations. She works with multi-generational families to create structures that preserve wealth, encourage stewardship, and strengthen family unity around shared values.

Through intentional planning, she helps clients pass down more than assets. She helps them pass down clarity, confidence, and purpose — equipping children and grandchildren with the tools and financial literacy needed to navigate life responsibly and generously. Her holistic approach ensures wealth becomes a legacy of strength rather than a source of stress.

Comprehensive Wealth Management

At InVestra, Stephanie approaches wealth management with the whole client in mind. Her services are designed to integrate strategy, protection, and long-term vision, including:

- Comprehensive Financial Planning
- Retirement & Income Distribution Strategy
- Investment Management
- Fiduciary Consulting for Retirement Plans
- Legacy & Estate Coordination
- Strategic Planning During Major Life Transitions

Every recommendation is aligned with a client's broader life goals, ensuring that wealth serves as a foundation for opportunity, independence, and impact.

Service Beyond the Office

Stephanie is a member of the Association of Divorce Financial Planners, Columbia Estate Planning Council and SC Financial Planning Association. Stephanie is currently on the Advisory Board for Hope Haven of SC, a non-profit seeking to fulfill the need for safe places for women leaving traumatic situations such as domestic abuse and human trafficking. Historically, she has held leadership roles including Vice President of the Columbia chapter of the SC Federation of Business & Professional Women's Clubs, board member of NAIFA-SC, and member of the Executive Committee for Women in Philanthropy of the Midlands United Way.

Stephanie can be found speaking on popular financial planning topics in the community: most recently on SC Business Review, Columbia Chamber of Commerce – 2025 Power in Heels, Feminine Founder Podcast and 30 Minutes Down South / iHeart Podcast.

A woman of faith and community, Stephanie enjoys life with her husband, Jason, and their daughter, Anna Caroline. Whether walking on the beach, hiking, traveling abroad, playing cards, or tennis, she values time spent building meaningful memories. She is an active member of Columbia Crossroads Church in Chapin, South Carolina.

Her Philosophy

Stephanie believes wealth planning should create confidence, not confusion. Through education, transparency, and strategic foresight, she helps clients move forward with clarity — building financial strength that supports both present peace and future possibility.

Because when your financial life is aligned, you're free to focus on what matters most.