

Advancing Operational Excellence Through Technology and Shared Leadership

Executive Summary

InVestra Financial continues to demonstrate its commitment to operational excellence, scalable systems, and technology-driven innovation within the wealth management industry. This week, Donna Stewart, Operations Manager at InVestra Financial, participated as a panelist at Visionary Square's Administrative & Operations Workshop, hosted at LPL Financial headquarters in Fort Mill, South Carolina.

The discussion focused on improving firm efficiency through technology and highlighted the growing importance of strong operational foundations in shaping the future of wealth management.

Event Overview

Donna Stewart served as a panelist for the session titled “**Improving Firm Efficiency Through Technology.**” The workshop brought together operations and administrative leaders from across the country to exchange ideas, share best practices, and discuss opportunities to strengthen firm performance.

The event emphasized that the future of wealth management extends beyond investment strategies. Long-term success will increasingly depend on operational excellence, scalable infrastructure, and the thoughtful application of technology to support both advisors and clients.

Key Themes

Operational Excellence as a Strategic Advantage

Firms that lead the next decade of wealth management will not rely solely on strong advisors. They will also be defined by efficient operations, well-designed systems, and leadership teams committed to continuous improvement.

Operational excellence allows advisors to spend more time serving clients, while strong internal processes help ensure consistency, responsiveness, and a better overall client experience.

Technology as a Driver of Efficiency

The panel discussion underscored the role of technology in helping firms become more efficient and scalable. Thoughtful technology adoption can streamline workflows, reduce administrative friction, and create more effective support structures for advisors and their clients.

For clients, this means a more seamless experience, stronger service delivery, and a firm better equipped to meet evolving needs.

Collaboration and Knowledge Sharing

InVestra Financial believes innovation is most powerful when knowledge is shared. By participating in industry conversations like this workshop, the firm contributes to a broader exchange of ideas that benefits individual organizations and the wealth management profession as a whole.

Donna Stewart summarized this approach by emphasizing that operations leaders are responsible not only for helping firms run more efficiently, but also for creating infrastructure that enables advisors to serve clients at the highest level possible.

Leadership and Industry Representation

The event also highlighted the importance of diverse and capable leadership in operations, technology, and firm management. InVestra Financial is proud to see strong female leadership represented in these areas, helping shape meaningful improvements across the industry.

This leadership is critical as firms continue to evolve, adopt new technologies, and build systems that improve outcomes for both advisors and clients.

Client Impact

For clients, InVestra Financial's focus on operational improvement directly supports a stronger service experience. Investments in technology, process improvement, and leadership development help ensure that the firm remains prepared to deliver efficient, thoughtful, and high-quality support.

By engaging in industry-wide discussions and sharing best practices, InVestra Financial continues to strengthen its ability to serve clients with consistency, care, and forward-looking solutions.

Conclusion

InVestra Financial's participation in Visionary Square's Administrative & Operations Workshop reflects the firm's ongoing commitment to innovation, collaboration, and operational excellence. Through leadership, shared knowledge, and the thoughtful use of technology, InVestra Financial remains focused on helping define the future of wealth management while improving outcomes for the clients and advisors it serves.