INVESTRA

CLIENT BRIEF

COMMUNITY LEADERSHIP

Stephanie Vokral Appointed to the Central Carolina Community Foundation Board of Trustees

A client-facing overview of the appointment, its community context, and the perspective Stephanie brings to values-based wealth planning.

> **The appointment brings together financial expertise, community service, and a shared commitment to strengthening the Midlands through philanthropy.**
>
> *InVestra perspective, based on the Foundation announcement and public advisor profile*

Prepared for InVestra clients and professional partners

July 2026 | Columbia, South Carolina

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PRESS RELEASE FOCUS

A New Chapter in Community Leadership

On July 9, 2026, Central Carolina Community Foundation announced that Stephanie Vokral will join its Board of Trustees for Fiscal Year 2027. The Foundation introduced Stephanie alongside five other leaders from business, education, healthcare, finance, athletics, and philanthropy, emphasizing the breadth of experience the incoming trustees will bring to the Midlands. [1]

The Foundation identifies Stephanie as Lead Private Wealth Advisor for InVestra's Columbia office and highlights more than 26 years of experience helping individuals and families approach financial planning with confidence. The announcement also recognizes her work in comprehensive wealth management, retirement and estate planning, fiduciary consulting, and major financial transitions. [1]

FY 2027	26+ years	3 credentials	Columbia
BOARD TERM	FINANCIAL PLANNING EXPERIENCE	CFP®, AIF®, CDFA®	INVESTRA OFFICE

Why the appointment is meaningful

Community insight

Board service places Stephanie in dialogue with leaders working across the Midlands' civic, nonprofit, education, healthcare, and business communities.

Philanthropic perspective

The Foundation's work centers on connecting donors, nonprofits, and community leaders - a natural complement to planning conversations about generosity, legacy, and impact.

Values-based stewardship

The appointment reinforces a planning philosophy that considers not only financial outcomes, but also family values, responsible stewardship, and long-term community contribution.

About the Foundation

Central Carolina Community Foundation describes its mission as connecting and mobilizing people and resources to strengthen the community. Its 2025-2028 strategic plan prioritizes philanthropic growth, community support, community leadership, and organizational excellence. [3]

The Foundation states that its trustees are community leaders who represent the diverse public interests of the Midlands and contribute their time and expertise without compensation. Its current board page lists Stephanie as representing InVestra and The Financial Knot. [2]

ADVISOR PROFILE

The Perspective Stephanie Brings to Clients

Stephanie’s new board role builds on a client practice already shaped by complex decision-making, fiduciary responsibility, family transitions, and long-range planning. Her public InVestra profile presents a holistic approach designed to replace financial stress with informed, empowered decision-making. [4]

CLIENT-FACING STRENGTH	HOW IT SHOWS UP IN PLANNING
Comprehensive wealth planning	Integrating retirement income, investment strategy, tax-aware planning, risk management, education planning, and estate and legacy coordination.
Major life transitions	Helping clients organize financial choices during divorce, widowhood, retirement, caregiving, business transitions, and other periods of change.
Fiduciary consulting	Supporting retirement-plan sponsors and board members as they evaluate fiduciary responsibilities and governance practices.
Multi-generational stewardship	Helping families connect wealth with shared values, financial education, legacy goals, and responsible decision-making across generations.

A record of service beyond the office

The Foundation’s announcement notes Stephanie’s advisory-board service with Hope Haven of South Carolina and prior leadership roles with the South Carolina Federation of Business & Professional Women’s Clubs, NAIFA-SC, and Women in Philanthropy of the Midlands United Way. [1] InVestra also lists her professional affiliations with the Association of Divorce Financial Planners, Columbia Estate Planning Council, and South Carolina Financial Planning Association. [4]

> **For clients, the most relevant takeaway is not simply a new title. It is the continued integration of financial planning, family stewardship, charitable intent, and community awareness.**
>
> *Client-facing interpretation*

CLIENT RELEVANCE

How This Perspective Can Inform Planning Conversations

Clarifying charitable intent

Identifying the causes, communities, and outcomes a family hopes to support - before selecting structures or making irrevocable decisions.

Connecting wealth and values

Bringing philanthropy, family governance, estate planning, and financial education into one coordinated long-term conversation.

Coordinating professional advice

Working alongside attorneys, tax professionals, and charitable-planning specialists when a client's goals require legal, tax, or foundation expertise.

Planning for lasting impact

Helping clients consider how giving, stewardship, and legacy decisions may affect family members and communities across generations.

InVestra client-facing perspective

Stephanie Vokral's appointment to the Central Carolina Community Foundation Board of Trustees reflects a career built at the intersection of financial clarity, fiduciary responsibility, and service. As Lead Private Wealth Advisor in Columbia, she helps individuals and families address complex decisions with a structured plan, a long-term view, and attention to the values that give wealth its purpose.

Her board service offers an additional vantage point on the people, institutions, and philanthropic priorities shaping the Midlands. For InVestra clients, that perspective can enrich conversations about generosity, legacy, family stewardship, and the role financial resources can play in creating durable impact.

IMPORTANT CONTEXT

- Stephanie's Foundation board service is separate from her advisory work and does not imply endorsement of InVestra, its services, or any investment strategy by Central Carolina Community Foundation.
- Charitable, estate, tax, and legal strategies should be evaluated individually with the appropriate qualified professionals.
- This report is based on public information and is intended for educational and relationship-communication purposes only.

Public sources

[1] Central Carolina Community Foundation, "Central Carolina Community Foundation Welcomes New Fiscal Year 2027 Board Members," July 9, 2026. View source

[2] Central Carolina Community Foundation, Board of Trustees. View source

[3] Central Carolina Community Foundation, Strategic Plan 2025-2028. View source

[4] InVestra Financial, Stephanie Vokral, CFP®, AIF®, CDFA® profile. View source