INTERNAL MEMO:

InVestra Operations Summary — June to mid August 2026

Across the uploaded materials, InVestra's activity from June through August 2026 shows a firm moving on **four parallel priorities: institutionalizing a specialized executive-wealth service model, building advisor capacity, expanding national brand visibility, and reinforcing its position with affluent and ultra-high-net-worth women.**

June 2026 — Productizing the executive-liquidity model

June's most substantive operational work was the conversion of InVestra's prior SpaceX liquidity-event experience into a **repeatable advisory framework for executives and senior employees at other high-growth technology companies**, particularly OpenAI and Anthropic.

The June 12 materials created client-facing reports, advisor talking points, due-diligence frameworks, and executive wealth playbooks centered on pre-IPO and concentrated-equity planning. The OpenAI playbook explicitly describes its purpose as translating the SpaceX work into a repeatable model for OpenAI-affiliated executives. Each engagement was designed to produce an Equity Inventory, Tax Map, Liquidity Budget, Diversification Policy, Estate Priority List, and post-liquidity Investment Policy Statement.

Operationally, this was more than marketing content. InVestra documented a structured **90-day pre-liquidity workflow**: collect and verify equity data; model tax exposure with CPAs; coordinate estate and charitable planning with counsel; establish concentration and staged-sale rules; and design the post-liquidity portfolio.

The broader AI liquidity strategy applied the same model to both OpenAI and Anthropic, emphasizing that planning should begin before final IPO pricing or liquidity dates are known. The framework called for grant inventories, tax modeling, trust and charitable planning, diversification rules, estate architecture, and white-glove delivery.

June takeaway: InVestra was turning specialized experience with complex technology executives into proprietary, scalable advisory processes rather than treating each liquidity event as a one-off engagement.

July 2026 — Talent infrastructure plus accelerated market positioning

On July 13, leadership developed a **Women's Advisor Development Initiative** aimed at creating a more systematic internal talent pipeline. The proposal called for an inclusive early-career program with targeted outreach to women, designed to move successful hires from client-relationship roles toward Associate Advisor, Principal Advisor/Office Lead, or headquarters wealth-management positions.

The recommended pilot was operationally specific: **4–6 paid interns or Client Relationship Associates**, salary and benefits rather than first-year commission dependence, milestone bonuses, paid licensing/CFP support, a 24-month curriculum, supervised client exposure, mentoring and executive sponsorship, published advancement gates, monthly feedback, and workload/flexibility standards. Governance would include HR, employment counsel and compliance approval plus quarterly cohort and pay-equity reviews.

At the same time, external visibility increased materially. Forbes featured InVestra on July 15 around its specialization in ultra-high-net-worth female executives and its ability to integrate equity compensation, tax, estate, business, family and liquidity planning. Grit Daily followed on July 29, highlighting advance IPO preparation, RSU/PSU scenario work, multi-year tax projections, AMT analysis, residency strategy and liquidity modeling.

By July 31, CEO Weekly was reinforcing the same positioning: high-touch service for affluent women, multidisciplinary planning and sophisticated executive-equity capabilities. That placement, however, is explicitly identified in the internal media report as **branded content**, so its value is primarily positioning, visibility and content repurposing rather than independent editorial endorsement.

July takeaway: InVestra was building both sides of its growth engine—**advisor capacity internally and authority/lead generation externally.**

August 2026 — Brand consolidation and broader validation

August coverage increasingly reflected a consistent market narrative rather than isolated publicity.

Fast Company Philippines described the firm as deliberately structured for financially complex high- and ultra-high-net-worth women, emphasizing multidisciplinary expertise, advance modeling, and a **depth-over-volume model supported by the reported $1 million account minimum**. It also described InVestra as operating in more than 20 states with offices in Jacksonville and Columbia.

Financial Tech Times similarly emphasized the firm's analytical infrastructure for female executives—particularly pre-IPO planning, equity compensation, taxation, liquidity events and concentrated wealth—and characterized preparedness and technical sophistication as core differentiators.

Women's Journal on August 4 reinforced the life-first wealth-management model, including liquidity events, divorce, business sales, estate planning, charitable giving and long-term care. That report also explicitly identifies the piece as **branded content**, which should be tracked separately from earned editorial media.

By August 10, The Entrepreneur Times was presenting the larger founder narrative: InVestra's specialization was not a recent pivot but a deliberate strategy dating to its 2012 founding, with growth attributed to consistent positioning around complex clients.

The period also included recognition as a **2026 Best of South Carolina Regional Winner in the Financial Advisors category**, reinforcing the Columbia/South Carolina presence and the broader service offering spanning planning, asset management, retirement, estate, tax, risk, insurance, business planning and trust services.

Overall operating picture

The June–August period suggests that InVestra was evolving from a differentiated boutique practice into a more **systematized specialist wealth-management platform**.

The operating model remained intentionally selective: a reported **$1 million minimum**, a client base extending across **more than 20 states**, offices in Jacksonville and Columbia, and a service proposition centered on high-touch, multidisciplinary work rather than client volume.

Three strategic capabilities became increasingly connected:

1. **Specialized client IP:** repeatable pre-liquidity, concentrated-equity, tax, estate and diversification workflows for executives.
2. **Talent scalability:** a proposed structured path for developing junior professionals into advisors and future office leaders.
3. **Market authority:** sustained coverage positioning Erin Eiras and InVestra around affluent women, executive wealth and complex financial transitions.

Founder credibility was also being leveraged strategically. Multiple reports highlight Erin Eiras's selection as one of **20 advisors from an LPL network of more than 32,000** for the 2026 Ambassador Council, creating both external validation and a channel into broader industry discussions.

In one sentence: From June through August 2026, InVestra appears to have focused on converting its expertise with complex female executives into a repeatable national advisory model, while simultaneously developing the talent infrastructure and brand visibility required to support that specialization at greater scale.