

---

# Report: InVestra Columbia, SC vs Key Local Competitors

---

## Executive Summary

InVestra Financial runs a **Columbia, SC “Carolina Region” office** at **625 Meadow St, Suite W, Columbia, SC 29205** as part of its national RIA platform. This report compares that **Columbia branch** to leading local South Carolina wealth managers, with directional AUM estimates.investra+1

---

## 1. InVestra Financial – Columbia, SC Office

### Firm Profile

- **Headquarters:** Jacksonville, FL; primary office: 1431 Riverplace Blvd #910, Jacksonville, FL 32207.linkedin+1
- **Columbia, SC location:** 625 Meadow St, Suite W, Columbia, SC 29205.investra+1
- **Founded:** 2012.whosonthemove
- **Model:** Fiduciary, fee-based or fee-only RIA; operates under the same Jacksonville RIA registration.
- **Lead in Columbia:** **Stephanie Vokral**, Lead Private Wealth Advisor, with over 26 years of experience in private wealth management.investra

### Estimated AUM (Columbia-region view)

- Total firm AUM is not disclosed, but earlier work suggests **InVestra as a whole is in the ≈\$700–800M AUM range, in the top 3% of wealth managers by AUM nationally.investra+2**
- The Columbia office is a **regional branch**, not a standalone RIA, so its “local” AUM is a **subset** of that total; a reasonable directional estimate is **\$100–300M of AUM tied to the Columbia area**, depending on how much of the overall book is based there.

### Key Differentiators

- **Same boutique, UHNW-focused model as Jacksonville:**
  - Holistic, goals-based planning, tax-aware investing, estate/legacy, and life-transition focus.investra+1
  - Strong emphasis on **high-net-worth households and multi-generational wealth**.investra+1
- **Women- and family-focused:**
  - Known for **divorce-financial-planning work** and clear positioning around women-focused wealth.investra+1
- **National-scale tools, local-office access:**
  - Uses the same **LPL-based platforms, GuidedWealth, and tax-loss-harvesting tech** as the Jacksonville office, but with local SC-based advisors.finance.yahoo+1

## Strengths For You (Columbia-based client)

- Access to a **UHNW-oriented, fiduciary RIA** with local, in-person advisors in Columbia.
- Strong **tax-aware, equity-comp-compatible** planning without having to chase a big-city brand.
- Relationship-driven, not “bank-branch” style.

## Limitations

- The Columbia office is a **satellite**, not a fully independent RIA, so you do not get a separate SC-only balance sheet.
- AUM and performance data are tied to the parent Jacksonville-based firm.

---

## 2. Local Columbia SC Competitors (AUM-style estimates)

Public AUM data for most Columbia-area RIAs is sparse, so estimates are based on revenue, firm-size indicators, and national patterns. Where possible, ranges are conservative.

---

### Competitor A: Local Columbia-Area RIA / Bank-Affiliated Wealth Manager

Many Columbia-based wealth managers are **regional banks or multi-office RIAs** that include Columbia as one branch among several. Typical characteristics:

- **Model:**
  - Often **fee-based hybrid** (advisory + product), tied to a regional bank or multi-state network.

- Strong emphasis on **retirement-oriented planning** and brokerage-style portfolios.investra
  - **Estimated AUM for Columbia-focused practices:**
    - Small-to-mid-sized Columbia-only RIAs likely sit in the **\$50–200M AUM** band, depending on the firm.sonomawealthadvisors+1
  - **Pros for Columbia residents:**
    - Very local, often with a long-standing branch presence.
    - Good for straightforward retirement and college-planning work.
  - **Cons:**
    - Less likely to specialize in **UHNW, divorce-finance, or concentrated-stock-heavy** situations.
    - Less consistent “fee-only” or fully fiduciary stance than InVestra.
- 

## Competitor B: Larger South Carolina RIA (State-Wide)

Some South Carolina RIAs are headquartered outside Columbia but serve the Columbia MSA (Columbia, Charleston, Upstate).

- **Model:**
    - Multi-office, fee-based or fee-only RIAs managing high-net-worth and institutional clients.
  - **Estimated AUM for mid-size SC RIAs:**
    - Many mid-size state-wide RIAs in SC sit in the **\$200–600M AUM** range, similar to the InVestra-level Jacksonville firms.swfinstitute+1
  - **Pros:**
    - More scale, richer planning resources, and broader product set than a solo advisor.
  - **Cons:**
    - Columbia residents may see diluted “local” attention.
    - Less tailored to **women-focused or divorce-finance niches** than InVestra-Columbia.
- 

## Competitor C: Big-Nationally-branded Wire-House Teams in Columbia

National platforms (e.g., Morgan Stanley, Ameriprise, Edward Jones, UBS) all have **Columbia-based advisors**, but:

- **Model:**
  - Usually **commission-eligible** or dual-comp models, with optional fiduciary wrap accounts.sonomawealthadvisors+1
- **Estimated AUM for Columbia-based teams:**

- A Columbia-based team at a national brand might manage **\$50–250M in local AUM**, depending on the team and branch.
- **Pros:**
  - National brand, large product menu, and research support.
- **Cons:**
  - More product-oriented pressure.
  - Less “boutique” and less UHNW-women-focused than InVestra.

### 3. InVestra Columbia, SC vs Local Competitors – At A Glance

Firm / Type	Location / Model	Estimated AUM (Columbia-area view)	Key Focus	For Columbia-based UHNW Client
<b>InVestra (Columbia, SC branch)</b>	Local office of Jacksonville RIA	≈**\$100–300M** (subset of ≈\$300–800M total firm AUM) investra+1	UHNW, women-focused, divorce-finance, holistic planning	Strong; boutique, fiduciary, with strong specialization.
<b>Local Columbia-only independent RIA</b>	Columbia-based, small-team RIA	≈**\$50–200M** (estimate) investra	General planning, retirement-focused	Good for basic planning; less niche specialization.
<b>Mid-size South Carolina RIA (multi-city)</b>	State-wide, multiple offices	≈**\$200–600M** (estimate) sonomawealthadvisors +1	Broad HNW, range of clients	Strong scale, but Columbia may be one of many offices.
<b>Columbia-based national-brand team</b>	Local team at big wire-house	≈**\$50–250M** (estimate) investra	Commission-eligible, product-heavy	Brand strength, but less boutique and fiduciary clarity.

### 4. Strategic Takeaways (Columbia, SC)

- **InVestra’s Columbia office is a very strong option** if you want:
  - A **fiduciary, women-focused, UHNW-oriented RIA**,
  - In-person access in **Columbia**,
  - The same tools and platform as a Jacksonville-based national RIA.
- **Local Columbia-only RIAs** make sense if you want:

- A purely **local, small-firm** feel,
  - But you may sacrifice some UHNW-specific tools and niche specialization.
  - **State-wide SC RIAs or national teams** are good if you want:
    - More brand heft or product breadth,
    - But you may trade off the focused, boutique, women-finance angle.
-