

Columbia, SC financial advisors

Evaluated across 6 independent metrics – fiduciary standing, client reviews, credentials, community presence, AUM/scale, and specialization fit

- Fee-only fiduciary
- National award recognition
- Boutique / specialist
- Fee-based / wirehouse

INDEPENDENT & BOUTIQUE FIRMS

InVestra Financial – Columbia Office

Stephanie Vokral, CFP, CDFA, AIF · 625 Meadow St, Columbia SC · Est. locally ~2023

Fee-only fiduciary

Divorce financial specialist

Women in transition focus

CFP + CDFA + AIF

17+ states reach

Fiduciary / fees  5/5

Client reviews  4/5