

This comprehensive report provides an in-depth analysis of **InVestra Financial** (InVestra.com), synthesizing historical data, service capabilities, and its current competitive standing as of April 2026.

### **1. Core Capabilities & Specialized Services**

InVestra differentiates itself from generalist firms through a "goals-based" architecture that blends high-touch human expertise with digital scalability.

- Women-Centric Wealth Management:** A signature vertical focused on empowering women in high-stakes life transitions (divorce, widowhood, or executive leadership).

- Divorce Financial Planning:** Specialized expertise through the **Certified Divorce Financial Analyst (CDFA®)** designation. This service assists in asset division, tax implication modeling, and post-divorce lifestyle restructuring.

- Business Exit Strategies:** Led by **Certified Exit Planning Advisors (CEPA®)**, the firm advises business owners on value acceleration, succession planning, and pre-liquidity event tax optimization.

- Guided Wealth Portfolio (Digital Offering):** A hybrid "robo-advisor" solution that combines algorithmic management with human advisor access.

  - Minimum Investment:** \$5,000.

  - Fee Structure:** 0.35% platform fee + ~0.50% advisor fee (for "Plus" versions).

  - Functionality:** Daily monitoring, tax-loss harvesting, and automated rebalancing.

### **2. Strategic History & Growth Milestones**

InVestra's evolution mirrors the broader shift in the financial industry from transaction-based brokerage to holistic fiduciary advice.

- 2006 (Foundation):** Founded by Erin D. Eiras in Jacksonville, FL, as a boutique practice.

- 2013–2018 (Institutional Pivot):** Affiliated with Independent Advisor Alliance (IAA) to leverage a hybrid-RIA model, moving away from traditional wirehouse structures.

- 2023 (Capital Infusion):** **LPL Financial** acquired a 20% stake in the firm's underlying platform, providing a multi-billion dollar capital cushion for technology and compliance infrastructure.

- 2024 (Regional Expansion):** Opened the **Columbia, SC office**, led by Stephanie Vokral (CFP®, CDFA®), signaling a move from a local practice to a regional presence.

\* \*\*March 2026 (The Visionary Square Rebrand):\*\* The parent platform (IAA) rebranded as \*\*Visionary Square\*\*, reflecting a modern focus on advisor-led innovation and client-centric collaboration.

### ### \*\*3. Market Standing & Institutional Scale\*\*

InVestra occupies a unique "Middle Market" position—delivering the intimacy of a boutique while operating on a massive institutional backbone.

#### #### \*\*Platform Power (Visionary Square)\*\*

\* \*\*Assets Under Supervision (AUS):\*\* ~\$23 Billion.

\* \*\*Network Depth:\*\* 257 advisors across 29 states.

\* \*\*Benchmarking:\*\* While the average independent RIA manages roughly \*\*\$393 million\*\*, InVestra's platform is over \*\*58x larger\*\* than the industry median, placing it in the top tier of US hybrid-RIAs.

#### #### \*\*Comparative Competitive Positioning\*\*

| Metric | InVestra (Boutique) | Typical Local Peers | National Mega-Firms |

|---|---|---|---|

| \*\*Service Model\*\* | Specialized/High-Touch | Generalist | Standardized/Call-Center |

| \*\*AUM Access\*\* | Institutional-Grade | Local/Restricted | Mass-Market |

| \*\*Credentials\*\* | CEPA®, CPFA®, CDFAs® | Often CFP® Only | High Variation |

| \*\*Fee Transparency\*\* | Fiduciary/Fee-Based | Mixed | High (Internal Fees) |

### ### \*\*4. Key Leadership & Professional Accolades\*\*

The firm's standing is anchored by the specific credentials of its leadership team, which are rare in the boutique space:

\* \*\*Erin D. Eiras (Founder):\*\* Selected for the \*\*LPL Financial Ambassador Council\*\* (one of only 20 advisors nationally). She is a frequent speaker at the \*\*Fearless Investing Conference\*\* and is recognized as a leading advocate for female financial literacy.

\* \*\*Stephanie Vokral (Partner):\*\* Operates "The Financial Knot®" vertical; a veteran with 25+ years of experience in the Columbia market, specializing in collaborative law and fiduciary standards.

### ### \*\*5. Summary Assessment\*\*

As of 2026, InVestra.com is no longer a small local practice but a **\*\*regional wealth boutique\*\*** with national-scale resources. Its competitive edge lies in **\*\*Niche Planning\*\***—specifically for business owners and high-net-worth women—where generalist firms often lack the specialized certifications (CEPA, CDFA) required for complex life events. For clients, this provides a "best of both worlds" scenario: a personal, woman-led advisory team supported by \$23 billion in platform security.