

# Report: InVestra vs Top Jacksonville Competitors

*InVestra Financial and Key Local Wealth Managers – A Side-by-Side Overview*

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## Executive Summary

This report profiles **InVestra Financial** and its **top Jacksonville-area competitors** for a high-net-worth, likely female-executive client, with:

- Firm focus and positioning,
- Estimated AUM,
- Service style and strengths.

Numbers here are **well-reasoned estimates** where public data is incomplete, not exact disclosed figures.

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## 1. InVestra Financial (InVestra Financial Services)

### Firm Profile

- **Location:** 1431 Riverplace Blvd, Suite 910, Jacksonville, FL 32207.
- **Founded:** 2012.
- **Model:** Fiduciary, fee-based or fee-only RIA, with a strong emphasis on **high-net-worth and UHNW clients**.investra+1
- **Minimums:** Publicly targets households with **\$1M+ investable assets**.finance.yahoo

### Estimated AUM

- No exact AUM is published, but InVestra is described as:
  - **In the top 3% of wealth managers by AUM** nationally,
  - Planning a strategic shift once it **exceeds \$1B AUM**.investra+1
- Given that, a reasonable **estimated AUM range is \$700–\$800M**.

### Key Differentiators

- **Niche focus:** Ultra-high-net-worth **female executives, multi-generational families, and business owners**.investra+1

- **Service depth:**
  - Holistic, **goals-based wealth-management** (investing, tax, estate, legacy, and life-transition planning).investra+1
  - **Executive-compensation expertise** (RSUs, PSUs, deferred comp, concentrated stock, business-exit planning).investra+1
- **Technology and experience:**
  - Heavy internal technology spend relative to firm size (e.g., scenario-based planning, tax-loss-harvesting engines).investra+1
  - Strong women-focused and family-office–lite branding.investra+1

## Strengths For You

- Local, boutique, but well-capitalized and tech-savvy.
- Deep experience with **equity-compensation planning** and UHNW women-focused wealth.
- Very hands-on, relationship-driven model with a principal owner-advisor.

## Limitations To Consider

- Smaller than the largest Jacksonville RIAs, so fewer internal “silos” or product specialists.
- AUM and performance data are not as transparently disclosed as at some larger RIAs.

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## 2. Jacksonville Wealth Management, LLC (Jax-Wealth)

### Firm Profile

- **Location:** Jacksonville, FL.
- **Type:** Registered investment advisor focused on discretionary portfolio management and fiduciary planning.radiantanalytics+1
- **Model:** Fee-based, fiduciary, serving individuals and high-net-worth clients.unbiased

### Estimated AUM

- Reported on its Form ADV: **≈\$534M AUM** (as of Feb 2026).aum13f+1

### Key Differentiators

- **Scale and structure:**
  - Larger than InVestra in terms of disclosed AUM but not likely a larger firm overall, with a team-based approach. radiantanalytics

- Uses programs like **SWM and Jaxwrap** for customized portfolio management.unbiased
- **Focus:**
  - Broadly focused on high-net-worth individuals and families, with a strong institutional-style process.unbiased

## Strengths For You

- Higher AUM and team depth for more complex, large-portfolio needs.
- Fiduciary orientation with process-driven, discretionary management.

## Limitations

- Less explicitly marketed around **women-focused or female-executive** niches.
- May feel more “institutional” and less boutique than InVestra.

## 3. Capital Analysts of Jacksonville

### Firm Profile

- **Location:** Jacksonville, FL.
- **Model:** Fee-based financial planning and wealth management, serving individuals and families.capanjax+1
- **Services:** Retirement planning, investment management, and estate-planning-adjacent advice.

### Estimated AUM

- No public AUM figure is published, but revenue and valuation estimates suggest modest scale:
  - Estimated **revenue ≈\$14.3M**, implying likely **AUM roughly in the \$150–\$300M** range, assuming typical AUM-to-revenue ratios.prospeo

### Key Differentiators

- **Local, independent:** Jacksonville-based, not big-brand, with a strong local presence.capanjax
- **Planning-focused:** Emphasis on comprehensive financial planning as a core product.aum13f

## Strengths For You

- Local, relationship-driven, and planning-oriented.
- Less likely to push proprietary products, depending on structure.

## Limitations

- Less public focus on **UHNW, female executives, or RSU/PSU-heavy situations** than InVestra.
  - AUM is significantly smaller than the top Jacksonville RIAs.
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## 4. Augustine Asset Management, Inc. (Augustine)

### Firm Profile

- **Location:** Jacksonville, FL.
- **Founded:** 1985.
- **Model:** SEC-registered investment advisor, **fee-only** for many clients, serving high-net-worth individuals and institutions.unbiased

### Estimated AUM

- Public directories list **≈\$660M AUM**.unbiased

### Key Differentiators

- **Fee-only structure** (for private clients), which can appeal if you want to avoid commission-conflicted advice.unbiased
- **Long-tenured firm** with a mature, process-driven investment platform.

### Strengths For You

- Strong, fee-only orientation and large-scale fiduciary resources.
- Experience with **high-net-worth and institutional** clients.

### Limitations

- Less tailored to a **female-executive niche**; positioning is more generic “HNI” and institutional.
  - May feel more formal and less boutique than InVestra.
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## 5. Other Large Jacksonville RIAs (High-AUM Players)

Top Jacksonville lists highlight even larger firms, but they are **not a direct fit** for your “local boutique + UHNW women” lens, primarily because:

- **Largest Jacksonville advisors** (e.g., firms with **\$2–3+B AUM**) are more “wealth-management industrial” and less personalized.
- They are often **bank-affiliated, investment-consulting-heavy, or institutional-focused**, which is overkill for a single-family, UHNW-executive client.<sup>smartasset+1</sup>

Still, for completeness:

- Some Jacksonville RIAs are listed at **\$2B–\$3.5B AUM**, serving a broad mix of individuals and institutions.
- These are better suited if you want full-scale, multi-team, institutional-grade service, not a boutique relationship.

## 6. InVestra vs These Competitors – At A Glance

Firm	Type	Estimated AUM	Key Focus	For UHNW Female Executive
<b>InVestra Financial</b>	Boutique, woman-owned, fiduciary RIA	≈**\$300–800M** finance.yahoo+1	UHNW women, executives, equity comp, family-office-lite	Strong; boutique, tech-heavy, and women-focused.
<b>Jacksonville Wealth Management (Jax-Wealth)</b>	Team-based RIA	≈**\$534M** radientanalytics+1	Broad high-net-worth, discretionary management	Solid, more “institutional”; less niche on women.
<b>Capital Analysts of Jacksonville</b>	Local, independent RIA	≈**\$150–300M** (estimate) prospeo	General planning, retirement-focused	Local and relationship-driven, but no explicit UHNW-executive niche.
<b>Augustine Asset Management</b>	Long-tenured, fee-only-leaning RIA	≈**\$660M** unbiased	Fee-only for HNIs, full-service	Strong if you want large-scale, fee-only, but less tailored to female-executive dynamic.

Firm	Type	Estimated AUM	Key Focus	For UHNW Female Executive
Other top Jacksonville RIAs (e.g., \$2B+)	Large wealth-management firms	\$2–3.5B+ smartasset+1	Broad, multi-client, often institutional	Overkill for a boutique-style, personal-advisor relationship.

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## 7. Strategic Takeaways

- **InVestra** is a **strong, differentiated choice** if you want:
    - A **Jacksonville-based, woman-focused, UHNW-executive** advisor,
    - Hands-on, principal-advisor access,
    - Deep **RSU/PSU and tax-aware** planning,
    - Boutique feel with **technology-heavy tools**.
  - **Jacksonville Wealth Management** and **Augustine** make sense if:
    - You prioritize **large AUM, mature teams, and process-driven** management,
    - You are okay with a **less niche-focused** firm.
  - **Capital Analysts** is a more traditional local option if you want simplicity and general planning, but it does not emphasize the same UHNW-executive angle.
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