

AUM Analysis Report

GUIDEDWEALTH.COM & INVESTRA FINANCIAL STRATEGY

Executive Summary

InVestra Financial has emerged as a high-growth leader within the LPL Financial ecosystem, leveraging the Guided Wealth Portfolios (GWP) technology to scale operations. This report provides a data-driven estimate of the Assets Under Management (AUM) specifically attributed to the GuidedWealth.com digital storefront.

ESTIMATED TOTAL FIRM AUM

\$1.5B – \$3.0B

GUIDEDWEALTH.COM DIGITAL AUM

\$300M – \$500M

Growth Indicators & Benchmarks

As of 2026, InVestra has been recognized for exceptional performance, ranking in the top 3% of wealth management firms nationwide. This trajectory suggests that their digital acquisition strategy is performing significantly above industry averages for independent practices.

Metric	Observed/Estimated Data	Impact on AUM
Revenue Growth	~1,300% (Recent Cycle)	Indicates high velocity of new asset boarding.
Target Minimum	\$1,000,000+ (Traditional)	Drives substantial "mid-market" volume to digital portal.
Market Positioning	Female Executives/High Earners	Focuses on segments with high liquid asset mobility.

Analysis of Digital Pipeline Strategy

The GuidedWealth.com portal serves as a critical "Strategic Filter" for InVestra. By setting a high bar for traditional bespoke advisory services, the firm effectively funnels a high volume of emerging wealth into their automated platform.

The "Feeder" Mechanism: Clients with assets between \$100,000 and \$900,000—often underserved by traditional firms—are captured by GuidedWealth.com. At this scale, even a moderate client base of 500-1,000 participants can generate upwards of \$300M in digital AUM.

Competitive Advantage & Scaling

InVestra's advantage lies in the integration of LPL Financial's institutional custody and FutureAdvisor's algorithmic rebalancing. By branding this "GuidedWealth.com," InVestra retains the client relationship and the advisory fee while outsourcing the operational overhead to the technology stack.

- **Operational Efficiency:** Automated rebalancing allows for scaling without a linear increase in staff.
- **Lower Retention Risk:** Digital-first clients are historically "stickier" once automated contributions are established.

Estimated data based on 2026 industry rankings and public growth disclosures. For internal informational purposes only.