

InVestra.com

Capabilities, Service Offering, Historic Development, and Market Standing

Research report based on public web sources reviewed prior to drafting

Prepared: 7 April 2026

Public identity: InVestra is presented as a client-facing brand and “other business name” of Independent Advisor Alliance, LLC (IAA).

Footprint: Public site lists offices in Jacksonville, FL and Columbia, SC, and nine named team members.

Platform scale: IAA / Visionary Square reports 22.4B USD of assets under supervision, 257 advisors, and 29 states in 2026.

Executive summary

- InVestra presents itself as a boutique wealth management practice centered on holistic planning, asset management, estate planning, retirement planning, risk management, tax planning, insurance, and specialized business-owner services. It also offers a digitally enabled Guided Wealth Portfolio solution for smaller or earlier-stage accounts.[1][4][5][6][7][8]
- From a public-disclosure standpoint, InVestra is not separately disclosed as its own SEC-registered investment adviser. The site repeatedly states that InVestra Financial / InVestra are other business names of Independent Advisor Alliance, LLC (IAA), a registered investment adviser. That means most scale metrics available to the market attach to IAA / Visionary Square rather than to InVestra alone.[2][3][13]
- InVestra's visible practice footprint is boutique: two offices, nine named staff members, and a positioning emphasis on high-net-worth, multigenerational, women-focused, business-owner, and transition-oriented planning.[2][3][10][11][12]
- The underlying platform is materially larger than the client-facing practice. IAA - now publicly rebranded as Visionary Square - states that it began in 2013 with seven advisors and today supports over 250 advisors / 140 partner firms; its homepage currently shows 257 advisors, 29 states, 22.4B USD in assets under supervision, and 22 staff.[14][15]
- In relative market terms, the best-supported characterization is that InVestra is a boutique advisory brand operating on top of a nationally scaled hybrid-RIA platform: much larger than the average individual-focused adviser when measured at the platform level, but far smaller than national giants such as LPL Financial.[14][20][23]

Methodology and limitations

This report uses public sources only: the InVestra website, IAA / Visionary Square materials, the IAA Form CRS / public adviser disclosures, market-context sources, and third-party advisor-ranking pages. No private internal records or client data were reviewed.

A central limitation is structural: because InVestra is disclosed as a business name of IAA rather than as a separate advisory firm, public sources do not provide a clean standalone InVestra line for assets under management, number of clients, revenue, or profit. Any claim that InVestra itself ranks at a precise percentile of wealth managers would therefore be speculative without non-public evidence.

Where possible, this report distinguishes between: (1) the client-facing InVestra practice, and (2) the larger operating / supervisory platform behind it.

Company snapshot

Dimension	Observed public evidence
Legal / disclosure status	InVestra Financial and InVestra are disclosed on the site as other business names of Independent Advisor Alliance, LLC.[2][3]
Primary office footprint	Jacksonville, Florida headquarters plus a Columbia, South Carolina regional office.[3]
Visible team size	Nine named team members on the public team page: founder, advisors, paraplanner, operations, compliance, CFO, and service support.[2]
Core client proposition	Holistic wealth management with integrated planning rather than investment selection alone.[1][4]
Specialized niches	Women’s wealth, divorce planning, business-owner services / exit planning, multigenerational wealth, and high-net-worth support.[5][10][11][12]
Digital capability	Guided Wealth Portfolio combines advisor access with a 24/7 digital investing interface and a 5,000 USD minimum for clients 62 or younger.[8]
Public fee indicators	Client-facing pricing page states planning fees depend on complexity, include 12 months of follow-up, and hourly consultations start at 250 USD with a 3-hour minimum; IAA Form CRS states advisory fees for management services are capped at 2.00% annually and planning is usually hourly or fixed.[9][13]
Underlying platform scale	IAA / Visionary Square publicly reports 22.4B USD AUS, 257 advisors, 29 states, and 22 staff in 2026.[14]

Capabilities and services offered

The InVestra site describes a broad, integrated advisory stack. Rather than isolating investment management as the sole value proposition, the firm frames wealth management as a coordinated service model spanning planning, execution, monitoring, and life-event support.[1][4]

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Capability area	What the site says InVestra does	Evidence of specialization	Assessment
Financial planning	Comprehensive planning process; milestone-based engagement; ongoing supervision and availability for calls, emails, and meetings. [9]	Planning language appears central to brand and founder narrative.[12]	Core strength
Asset / portfolio management	Goals-based asset management, diversification, risk assessment, portfolio strategies, and ongoing review.[4][16]	Fee-based orientation is explicitly highlighted on asset-management content. [16]	Core strength
Retirement planning	Defined contribution / benefit plans, IRAs, executive compensation, annuities, and distribution planning. [4]	Also supported in business-services menu for 401(k), SIMPLE, SEP, and 403(b) plans.[5]	Core strength
Estate and legacy planning	Will / trust / wealth transfer concepts, charitable giving, probate and tax minimization themes. [6][4]	Founder messaging strongly emphasizes generational wealth. [12]	Core strength
Tax planning	Reducing tax burden, minimizing tax impact on investments, and coordinated planning. [7]	Appears as a standing service line across the site.[4]	Important adjacent capability
Risk management / insurance	Risk assessment and insurance / annuities are included in the comprehensive wealth stack.[4]	Risk-management language appears across planning and women's wealth content.[10]	Important adjacent capability
Business-owner advisory	Cash management, investment	Founder holds CEPA credential; business	Differentiating niche

	management, retirement plans, buy-sell agreements, business valuation, and exit strategy support.[5]	exit planning is explicit.[5][11]	
Women-focused advisory	Dedicated women's wealth section addresses confidence, control, and life-transition themes.[10]	Public positioning is unusually explicit compared with many local advisors.[10]	Differentiating niche
Divorce planning	Site highlights a dedicated CDFA resource for divorce-related financial planning.[17]	Useful niche for transition planning and women's wealth crossover.[17]	Differentiating niche
Digital investing	Guided Wealth Portfolio offers online access, advisor guidance, tax-loss harvesting, and low minimums for qualifying younger investors.[8]	Extends brand down-market without abandoning advice model.	Useful distribution / onboarding capability

Operating footprint and team structure

The public contact page lists a Jacksonville headquarters at 1431 Riverplace Blvd #910, Jacksonville, FL 32207, and a Carolina Region office at 625 Meadow Street, Columbia, SC 29205.[3]

The public team page names nine people: Erin Eiras (Founder / Wealth Advisor), Stephanie Vokral (Wealth Advisor), Donna Stewart (Operations Manager), Kevin Kelly (Wealth Advisor), Victoria Hoch (Wealth Advisor), Natalie Barkley (CFP / paraplanner), Steph Primm (Client Service Associate), Jessica Sexton (Chief Compliance Officer), and Ashley Worley (Chief Financial Officer). [2]

That visible structure suggests a boutique advisory practice with meaningful operational depth for its size: it is not just a solo-advisor storefront. It has dedicated operations, compliance, finance, paraplanning, and client-service roles in addition to advisors.

Historic development

At the practice level, public evidence indicates a founder-led firm that has matured from a Jacksonville-centric practice into a two-office advisory brand. Erin Eiras is described as having been in wealth management for almost two decades, and the Columbia office expansion was announced in 2024 as part of growing demand in the Carolinas.[10][11][12]

At the platform level, the history is clearer and quantifiable. Visionary Square’s current “Our Story” page says the business started in 2013 with seven advisors. By 2026 it says the platform supports over 250 advisors and 140 partner firms, and the homepage currently displays 257 advisors across 29 states.[14][15]

The 2023-2026 public materials show a meaningful scale-up in platform assets and advisor count, plus strategic milestones such as LPL Financial’s minority investment in 2023, surpassing 20B USD in assets under supervision in 2024, and the 2026 rebrand from Independent Advisor Alliance to Visionary Square.[14][15][18][19]

Figure 1. Publicly disclosed IAA / Visionary Square assets-under-supervision trajectory assembled from 2023 fact sheets, a 2025 milestone announcement, and the 2026 homepage.[14][17][18][19]

Figure 2. 13F-reported equity AUM history for Independent Advisor Alliance. This is not total firm AUM / AUS and should be read as a partial capital-markets indicator only.[26]

Relative standing in the market

The strongest market-position conclusion is not that InVestra is a national-scale wealth manager on its own; the public evidence does not support that. Instead, InVestra appears to be a boutique advisory brand with a relatively broad planning menu, leveraging a much larger supervisory / infrastructure platform behind the scenes.[2][3][14]

Against the broader adviser industry, the platform is meaningfully scaled. The Investment Adviser Association reports that advisers focused on individuals were generally small in 2024, averaging 8 employees and 393M USD in assets under management. By contrast, the public platform figures attached to IAA / Visionary Square are 22.4B USD AUS and 257 advisors.[14][23]

Against national infrastructure players, however, the platform remains much smaller than LPL Financial, whose official public materials cite 2.4T USD in advisory and brokerage assets serviced and custodied, 32K+ advisors, 1,200 financial institutions, and 8M Americans served.[20][21]

Against local-market advisory firms in Columbia and Jacksonville, the comparison is mixed because the benchmark firms are separate registered advisers while InVestra is disclosed through IAA. SmartAsset's 2025 metro rankings show firms such as SouthState Advisory at 3.78B USD AUM in Columbia, and Jacksonville Wealth Management / Sanchez Wealth at roughly 435M-465M USD AUM in Jacksonville.[24][25] Because InVestra's standalone AUM is not public, no exact local rank can be proven from public records alone.

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Figure 3. Scale context for the platform behind InVestra. This chart compares public figures drawn from official or widely used third-party industry sources; it does not imply identical business models across all firms.[14][20][23][24][25]

Strategic interpretation

From a capabilities perspective, InVestra’s differentiation is not that it offers unusual basic services; many wealth managers offer planning, portfolio management, retirement advice, and estate coordination. What stands out is packaging: the firm combines those baseline services with explicit verticals around women’s wealth, divorce, business-owner exit planning, and multigenerational legacy work.[5][10][11][12][17]

The platform relationship matters commercially. For many prospective clients, a boutique advisor backed by a larger RIA / OSJ can be attractive because it combines perceived intimacy with deeper compliance, custody, and technology resources. InVestra’s disclosures and service language fit that model well.[2][13][14][20]

The trade-off is disclosure opacity. Because InVestra is not publicly carved out as a separate adviser entity, external evaluators cannot independently validate the practice’s own AUM, client count, growth rate, or profitability. This weakens direct benchmarking versus fully standalone RIAs and should be acknowledged in any due-diligence discussion.

Assessment: strengths, gaps, and watch items

What looks strong	What remains unverified or weaker from public evidence
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<ul style="list-style-type: none"> • Broad service menu spanning planning, investments, retirement, tax, estate, insurance, and business-owner needs. 	<ul style="list-style-type: none"> • No standalone public AUM, revenue, or client-count disclosure for InVestra itself.
<ul style="list-style-type: none"> • Visible operational depth beyond the advisors alone. 	<ul style="list-style-type: none"> • No independently verified public performance record attributable specifically to the InVestra practice.
<ul style="list-style-type: none"> • Distinct niche positioning in women’s wealth, divorce, and exit planning. 	<ul style="list-style-type: none"> • Fee schedule details on the client site are partly image-based / customized rather than fully machine-readable.
<ul style="list-style-type: none"> • Digital-investing option expands reach to younger / lower-minimum clients. 	<ul style="list-style-type: none"> • Some recent highly favorable articles about InVestra appear promotional or self-published and were not relied on for ranking claims.
<ul style="list-style-type: none"> • Backed by a larger national platform with meaningful scale. 	<ul style="list-style-type: none"> • Local ranking versus Jacksonville / Columbia RIAs cannot be stated precisely without non-public data.

Bottom line

InVestra.com represents a capable, planning-centric boutique wealth management practice with a notably broad advisory menu and especially clear specialization around women, families, business owners, and financial transitions.[1][4][5][10][17]

The practice’s real market strength appears to come from its combination of boutique front-end delivery and scaled back-end infrastructure. Publicly, that infrastructure is the IAA / Visionary Square platform - a 22.4B USD, multi-state hybrid-RIA organization that materially exceeds industry-average adviser scale while remaining far smaller than LPL and other national megaplatforms.[14][20][23]

For an analyst, buyer, or prospective client, the most accurate public-market description is: InVestra is a differentiated boutique advisory brand operating on top of a substantially larger national platform. It appears well-positioned in service breadth and niche focus, but its exact standalone economic rank cannot be verified from public disclosures alone.

Sources

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- [6] InVestra estate-planning page; estate-planning positioning; accessed April 2026.
- [7] InVestra tax-planning page; tax-minimization positioning; accessed April 2026.
- [8] InVestra Guided Wealth Portfolio page; digital investing and minimum-account language; accessed April 2026.

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- [9] InVestra pricing page; planning and hourly consultation language; accessed April 2026.
- [10] InVestra women's-wealth page; women-focused positioning; accessed April 2026.
- [11] InVestra "Branching Out" / Columbia expansion announcement; accessed April 2026.
- [12] InVestra Erin Eiras bio and SmartVestor page; founder positioning and multigenerational / experience language; accessed April 2026.
- [13] IAA Form CRS / relationship summary dated 30 June 2020; services, fee caps, conflicts, and disciplinary-history language reviewed from PDF.
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- [16] InVestra asset-management page; fee-based asset-management positioning; accessed April 2026.
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- [24] SmartAsset top financial advisors in Columbia, SC; public AUM data for local firms.
- [25] SmartAsset top financial advisors in Jacksonville, FL; public AUM data for local firms.
- [26] Holdings Channel page for Independent Advisor Alliance 13F AUM history; used as a partial public historical proxy only.