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InVestra Outspends Industry Competitors on Technology to Deliver White Glove Service at Family Office Scale | AP News

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London, England, United Kingdom, February 4, 2026 - InVestra's monthly technology expenditure exceeds what entire independent advisory practices earn in a year. A stark reality has emerged as a defining fault line in an industry experiencing unprecedented transformation, where the capacity to deliver institutional-grade service to ultra-high-net-worth clients increasingly depends on infrastructure investments that would bankrupt traditional operators.

Across the wealth management landscape, a technological arms race has intensified throughout 2024 and 2025, driven by client expectations that have evolved far beyond portfolio performance. Ultra-high-net-worth individuals now demand seamless integration of services ranging from business exit planning to cross-border real estate acquisition, from philanthropic structuring to private aviation advisory. Meeting these expectations requires software platforms, data analytics capabilities, and digital infrastructure that represent a fundamental reimagining of what wealth management entails.

The transformation reflects broader industry dynamics that have accelerated dramatically since 2023. According to recent research from Cerulli Associates, the global wealth management market

reached \$89.2 trillion in assets under management during 2024, with projections indicating growth to \$145.4 trillion by 2030. Technology investments have become the primary differentiator separating market segments. Deloitte's 2025 wealth management outlook indicates that leading firms now allocate significantly higher portions of revenue to technology infrastructure compared with industry averages.

The Infrastructure Imperative

InVestra has positioned itself within the technological vanguard through investments that challenge conventional assumptions about what independent wealth management firms can achieve. The firm maintains access to enterprise-grade financial software platforms typically reserved for wirehouses and global banking institutions, creating operational capabilities that mirror family office structures while serving multiple client households.

"Our technology costs more monthly than most independent financial providers earn," Eiras noted during a recent industry discussion. "That represents an intentional strategic choice reflecting our belief that ultra-high-net-worth clients deserve infrastructure matching their complexity."

The firm's technology stack integrates multiple specialized systems addressing distinct aspects of comprehensive wealth management. Portfolio management platforms provide real-time analytics across traditional securities, alternative investments, and private holdings. Tax optimization software models strategies across multiple jurisdictions and entity structures. Estate planning tools generate scenario analyses for legacy structures spanning multiple generations. Risk management systems monitor exposures across asset classes, incorporating derivatives, concentrated equity positions, and illiquid investments.

Infrastructure supports service capabilities extending well beyond traditional investment advisory. InVestra specialists assist clients with evaluating private jet fractional ownership programs, analyzing the tax implications of international real estate acquisitions, structuring charitable vehicles to maximize philanthropic impact, and coordinating with attorneys on business succession planning. Each service area requires specialized knowledge bases, analytical tools, and professional networks that independent advisors typically cannot access.

InVestra maintains strategic partnerships with multiple custodial platforms to optimize client service. LPL Financial serves as the primary trading partner, while the firm maintains custody relationships with Charles Schwab, Pershing, Fidelity, Raymond James, and additional institutions. Complex investment selection processes involve collaboration with Goldman Sachs, Merrill Lynch, and other institutional resources. The multi-custodian approach provides clients access to diverse investment opportunities while maintaining operational flexibility across different account structures.

Gender Dimensions in Wealth Management

The technological infrastructure supporting comprehensive service delivery has enabled InVestra to address a particularly underserved market segment. Female executives controlling substantial wealth represent a growing demographic with distinct advisory needs that traditional wealth management has struggled to recognize.

Research from McKinsey indicates that women controlled approximately \$10.9 trillion in investable assets across the United States during 2024, with projections suggesting the figure will reach \$16.8 trillion by 2030. Yet despite controlling substantial capital, women report significantly lower satisfaction with financial advisory relationships than their male counterparts.

A 2025 survey from the Boston Consulting Group revealed that a significant majority of women switch financial advisors within one year of a major wealth event such as inheritance, business sale, or divorce. The research identified specific factors driving dissatisfaction, including communication styles emphasizing technical jargon over outcome clarity, insufficient attention to values-based investing priorities, and failure to address the intersection of wealth management with life planning considerations.

InVestra has oriented its service model specifically toward addressing these gaps. The firm's growth trajectory reflects the market response to its focus. Expansion has accelerated substantially in recent years while maintaining a minimum account size of \$1 million, allowing intensive focus on each client household.

"Women of wealth require a completely different approach to investing than men," Eiras observed. "The traditional wealth management model was built around preferences and communication styles that don't resonate with a significant portion of the market."

The distinction extends beyond communication preferences into fundamental planning priorities. Research from UBS indicates that female investors demonstrate a substantially higher likelihood of incorporating environmental, social, and governance factors into investment decisions. Women show markedly greater interest in impact investing strategies and higher engagement with philanthropic planning as an integrated wealth management component.

Competitive Positioning and Market Recognition

The firm's performance has elevated it among the very top tier of wealth managers nationally, a distinction reflecting both asset accumulation and operational excellence metrics. InVestra has achieved or exceeded substantially all milestone targets established by its trading and custody partners. The firm maintains strategic relationships with multiple long-term care insurance providers, including Independent Financial Partners, John Hancock, Sage, Hartford, ING, Lincoln, Prudential, Genworth, and American General. Rankings among the highest performers nationally among insurance affiliates indicate expertise in sophisticated risk management strategies.

InVestra's comprehensive service model positions the firm to capture a larger share of client assets through addressing multiple planning needs via a coordinated team. The family office approach eliminates

the coordination challenges clients face when working with separate specialists for investment management, tax planning, estate structuring, risk management, and philanthropic advisory.

The firm operates across all geographic markets within the United States, providing consistent service quality regardless of client location. Remote communication technologies enable the team to maintain frequent contact with clients while sophisticated planning software allows real-time collaboration on financial scenarios. Geographic flexibility represents another differentiator in a field where many boutique practices remain tied to specific metropolitan areas.

Looking forward, Eiras emphasized that technology investments will continue accelerating as client expectations evolve and competitive pressures intensify. *"We're committed to maintaining infrastructure that enables us to serve clients at a level matching their sophistication and complexity. That commitment requires ongoing investment in capabilities that set new standards."*

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