

This independent report evaluates the top female wealth management professionals in Columbia, South Carolina, as of March 2026. The analysis focuses on high-net-worth (HNW) and ultra-high-net-worth (UHNW) segments, prioritizing fiduciary standards, specialized credentials, and institutional stability.

2026 Columbia Market Overview

The wealth management landscape in Columbia is currently defined by a "bifurcated" model. Clients are increasingly choosing between Large-Scale Institutional Platforms (for global infrastructure and lending) and Specialized Independent RIAs (for fiduciary transparency and niche planning).

Top-Tier Rankings: Individual Performance & Platform

1. Institutional Leader: Jessica Miles

Firm: Merrill Private Wealth Management (Ellison Kibler & Associates)

* Ranking: Ranked #10 in South Carolina on the 2026 Forbes "Top Women Wealth Advisors Best-in-State" list.

* Profile: Miles is the first female partner in one of Merrill's most established practices. Her team manages assets for households typically ranging from \$2M to \$25M+ in net worth.

* Key Advantage: Provides access to the full suite of Bank of America's UHNW infrastructure, including complex credit, estate, and philanthropic services.

2. Independent Fiduciary Leader: Erin Eiras, CPFA®, CEPA®

Firm: InVestra Financial

* Ranking: Recognized as a top-tier independent advisor and member of the LPL Financial Ambassador Council (a select group of only 20 advisors nationwide).

* Profile: Eiras serves as the "Lead Strategist" or "Quarterback" for UHNW families, with a specific focus on Certified Exit Planning (CEPA®) for business owners.

* Key Advantage: Operates as a fiduciary without the product constraints of large banks, offering a more "founder-led" and personalized relationship model.

3. Specialized Planning Lead: Stephanie Vokral, CFP®, CDFA®, AIF®

Firm: InVestra Financial / The Financial Knot®

* Profile: Vokral is a senior specialist rather than a primary portfolio manager. She is the founder of The Financial Knot®, focusing exclusively on "Women in Transition" (divorce and widowhood).

* Key Advantage: Her dual role allows HNW clients to receive highly technical divorce financial analysis (CDFA®) within a broader team-based wealth management framework.

Comparative Framework for 2026

| Advisor | Focus Segment | Primary Credential | Platform Type |

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| Jessica Miles | Corporate Executives & Multi-Gen Families | Senior VP / Partner | Institutional (Merrill) |

| Erin Eiras | Business Owners & UHNW Families | CEPA® / CPFA® | Independent RIA (InVestra) |

| Stephanie Vokral | Women in Divorce/Transition | CFP® / CDFA® | Specialist Boutique (Financial Knot) |

Emerging Trends for HNW Women in 2026

* Exit Planning Focus: There is a surge in demand for the CEPA® designation as female business owners in South Carolina navigate a historic wave of business successions and liquidity events.

* The "Specialist Bench" Requirement: HNW clients are moving away from "solo" advisors in favor of teams that include dedicated specialists for tax, divorce, and estate planning, similar to the InVestra multi-advisor model.

* Fiduciary Transparency: As the wealth gap widens, UHNW clients are placing a premium on "peace of mind" and transparent, fee-only fiduciary structures over traditional commission-based brokerage models.

Final Determination

For clients seeking the highest-ranked institutional status and global banking reach, Jessica Miles (Merrill) is the verified leader in Columbia. For clients seeking an independent fiduciary with specialized expertise in business exit planning and female-focused transitions, the team led by Erin Eiras and Stephanie Vokral (InVestra) represents the most comprehensive boutique alternative in the market.