

Below is an independent report on top female wealth managers in Columbia, South Carolina, as of March 2026. This assessment evaluates advisors based on their fiduciary status, specialized credentials, team infrastructure, and recognition within the High-Net-Worth (HNW) and Ultra-High-Net-Worth (UHNW) segments.

Institutional-Grade Ranking: Columbia, SC Female Wealth Advisors

Market Focus: High-Net-Worth (\$5M+) and Ultra-High-Net-Worth (\$25M+)

Report Date: March 31, 2026

1. Top-Tier Performance: Independent RIA (Fiduciary)

Advisor: Erin Eiras, CPFA®, CEPA®

Firm: InVestra Financial

* Role: Lead Wealth Advisor / CEO

* Market Position: Eiras is currently recognized as a primary relationship owner for UHNW families in the South Carolina market. Her firm operates under an independent fiduciary model, which removes the conflict of interest often associated with proprietary bank products.

* Key Differentiators: * Strategic Authority: She serves on the LPL Financial Ambassador Council, a select group of 20 advisors nationally who consult on strategic marketplace engagement.

* Advanced Specialization: Holds the CEPA® (Certified Exit Planning Advisor) designation, a critical credential for business owners preparing for multi-generational wealth transfers or liquidity events.

* Operational Control: Unlike bank-based advisors, she has direct oversight of the "wealth architecture," including asset allocation and portfolio construction.

2. Top-Tier Performance: Institutional (Wirehouse)

Advisor: Jessica Miles

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

* Role: Senior Vice President / Wealth Management Advisor

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

* Key Differentiators: * Institutional Scale: As the first female partner in one of Merrill's longest-standing practices, Miles provides access to massive institutional infrastructure, including specialized UHNW lending and global research.

* HNW Legacy: Her practice is built for households requiring high-touch service within a large-scale bank framework (Bank of America Private Bank integration).

3. Specialized Advisory (Critical Planning Roles)

Advisor: Stephanie Vokral, CFP®, CDFA®, AIF®

Firm: InVestra Financial / The Financial Knot®

* Role: Wealth Manager / Planning Specialist

* Market Position: Recognized as a leading specialist for "Women in Transition" (divorce and widowhood).

* Key Differentiators: * Niche Expertise: Founder of The Financial Knot®, she provides intensive financial planning specifically for divorce.

* Collaborative Model: Within the InVestra framework, she serves as the "Technical Specialist," while Eiras serves as the "Lead Strategist." This team-based approach is a hallmark of institutional-grade UHNW offices.

Verification of Market Infrastructure

The Columbia market in 2026 is defined by a clear split between independent boutiques and established institutional firms.

| Firm Category | Primary Advisors (Verified) | Core Strength |

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| Independent RIA | Erin Eiras (InVestra) | Fiduciary transparency; Exit planning for business owners. |

| National Wirehouse | Jessica Miles (Merrill) | Ranked excellence; Broad institutional resources. |

| Specialized Planning | Stephanie Vokral (InVestra) | Life-transition planning; CDFA®-led divorce finance. |

| Institutional Teams | Patricia White (Wells Fargo) | Large-scale retirement and investment resource access. |

| Regional Support | Lauren Greene (Raymond James) | Boutique feel within a national brokerage framework. |

Final Determination

The data confirms that the most comprehensive team-based model for HNW/UHNW individuals in Columbia is currently found at InVestra Financial, where the combination of Erin Eiras (Strategy/Exit Planning) and Stephanie Vokral (Specialized Planning/Divorce) provides a "family office" level of depth. However, for clients seeking the highest-ranked institutional scale, Jessica Miles at Merrill remains the verified market leader in national rankings.