

I received a large inheritance. Why should I hire InVestra?

InVestra Financial (often stylized as investra.com) is a boutique **wealth management firm** headquartered right in Jacksonville, Florida (at 1431 Riverplace Blvd), with a secondary office in Columbia, SC. They're a smaller, client-focused independent advisor group (operating as part of Independent Advisor Alliance, with securities through LPL Financial) that emphasizes personalized, holistic planning over one-size-fits-all investment products.

Receiving a large inheritance is a major life event that often brings complex needs—tax implications, investment decisions, estate/legacy planning, protecting the principal while growing it, and avoiding common pitfalls like emotional spending or poor allocation. Here's why many people in your situation consider working with a firm like InVestra:

1. **Specialized Handling of Sudden Wealth and Inheritance**

- They focus on **holistic wealth management** using a goals-based approach. This includes financial planning, asset management, retirement planning, education funding, and especially **estate planning** to minimize taxes (during life and after death), reduce probate issues, and preserve wealth across generations.

- Inheritances frequently involve multi-generational considerations, family dynamics, and legacy building. InVestra positions itself as a "long-term wealth and stewardship partner" that helps families maintain clarity, alignment, and continuity—not just chasing returns, but also family governance and next-generation readiness.

2. **Fee-Based / Client-Centric Structure**

- They describe a **fee-only** or fee-based model (as independent advisor representatives), which aligns their incentives with yours rather than commissions on specific products. This is often highlighted as allowing them to "work entirely for your best interests."

- Emphasis on customized strategies tailored to your unique circumstances, family situation, and objectives.

3. ****Experienced Team with Relevant Credentials****

- Led by founder Erin D. Eiras (CPFA®, CEPA®), with advisors holding designations like CFP® (Certified Financial Planner), AIF®, CDFA® (for divorce/financial transitions, which can overlap with inheritance complexities), ChFC®, etc.
- The team covers areas like business exit planning, women's wealth (though they serve a broad clientele), and multi-generational families. Clients have noted strong communication and comprehensive reviews in reviews (e.g., updating estate plans, insurance, retirement projections, and tax considerations).

4. ****Local Convenience + Institutional Backing****

- Being based in Jacksonville makes in-person meetings easy for someone in your area (your IP location aligns with this).
- They leverage affiliations with LPL Financial (FINRA/SIPC member) for broader resources while maintaining a boutique feel (small team, personalized service). Some materials mention access to technology investments and platforms for sophisticated planning.

5. ****Positive Client Feedback in Available Reviews****

- Local mentions (e.g., Yelp) describe "white glove service" for serious investors, with praise for results and communication.
- Testimonials often highlight thorough, caring guidance for complex situations like estate planning with international elements or overall family financial perspectives.

That said, ****hiring any advisor isn't automatic****—even for a large inheritance. Reasons to consider professional help in general include:

- Avoiding behavioral mistakes (e.g., rushing into investments or lifestyle inflation).
- Optimizing for taxes, risk, diversification, and long-term growth.
- Coordinating with accountants, attorneys, etc., for a unified plan.

Important Caveats

- ****Do your due diligence****: Review their Form CRS, ADV (via SEC or FINRA sites), fees, and performance philosophy. Interview multiple advisors (fee-only fiduciaries are often recommended for large sums).

- Past client experiences aren't guarantees; markets involve risk, and no firm is perfect.

- InVestra serves high-net-worth individuals, executives, business owners, and families focused on legacy—your situation may fit well if that's your priority.

If this matches what you're looking for (personalized, local, comprehensive planning for inheritance/legacy), reaching out for their complimentary consultation (they mention these for prospects and even legacy discussions with adult children) could be a low-commitment next step. You can contact them at 904.880.7878 or via investra.com.

Ultimately, the "why" depends on how well their approach aligns with your specific goals, risk tolerance, and values after you compare options. Many people with sudden wealth benefit from objective guidance to make the inheritance a lasting positive rather than a short-term windfall. If you share more details about your priorities (e.g., tax minimization, growth vs. preservation, family involvement), I can help refine this further.