InVestra

90-Day Implementation Roadmap

Action plan to scale InVestra executive-liquidity intelligence into active client acquisition

Leadership Execution Plan | Prepared for James Brown and InVestra leadership | June 12, 2026

Important: This package is designed to help InVestra scale a repeatable executive-liquidity advisory model. It is not a recommendation to buy, sell, or hold any security. Any client-facing language should be reviewed by compliance, legal, tax, and investment-policy professionals before distribution.

North Star

90-day objective: Launch a repeatable InVestra capability that produces company-specific intelligence, equips advisors, activates warm outreach, and converts executives into personalized pre-liquidity planning engagements.

Roadmap

Weeks	Focus	Key actions	Deliverables
1-2	Governance and templates	Approve labels, disclaimers, document design, source requirements, and review flow.	Master report template, source log, compliance checklist.
3-4	Target universe and top campaigns	Finalize top 10 companies, warm relationship map, referral partner map, and first event themes.	Target company map, campaign calendar, referral list.
5-6	Advisor enablement	Train advisors on discovery script, tax/estate handoff, equity inventory, and objections.	Advisor training deck, call script, intake packet.
7-8	Outbound launch	Begin warm outreach to Anthropic/OpenAI/SpaceX-adjacent contacts and professional centers of influence.	Email sequence, briefing invitation, webinar agenda.
9-10	Client conversion	Turn meetings into grant inventories, tax maps, and estate/action plans.	Client-specific workplans and follow-up letters.
11-12	Scale and institutionalize	Review conversion metrics, refine messaging, add two new company reports, and archive stale content.	Quarterly intelligence calendar and next 90-day plan.

Metrics Dashboard

Metric	Definition	Target for first 90 days
Company reports produced	New company-specific report packages completed and ready for review.	6-10
Advisor briefings	Internal enablement sessions completed.	4
Warm introductions	Referrals from clients, CPAs, estate attorneys, bankers, or executives.	25-50
Executive briefings booked	Qualified 30-minute calls or private briefings.	15-30
Planning engagements opened	Clients who provide documents for personalized planning.	5-12
AUM/revenue pipeline	Qualified opportunity value documented by advisor.	Leadership to set after first cohort

Immediate Next Actions for James

1. Confirm whether the approximate $500M SpaceX client gain can be internally documented and whether any anonymized version may be used in case-study materials.
2. Select the first two non-Anthropic/OpenAI companies for the next company-specific report package.
3. Identify five warm referral sources who already understand InVestra’s SpaceX credibility.
4. Assign an internal compliance reviewer for the executive outreach kit and one-page checklist.

5. Schedule a leadership review meeting to decide which assets can move from internal draft to advisor-ready status.

Decision Log Template

Decision	Owner	Due date	Status
Approve master disclosure language	Compliance	Week 1	Open
Approve target company priority list	James / leadership	Week 2	Open
Select first referral partner event	Growth lead	Week 3	Open
Approve client-facing checklist	Compliance	Week 4	Open
Launch Wave 1 outreach	Advisors	Week 7	Open

Source Notes and Use Controls

- InVestra internal SpaceX liquidity-event planning materials, May-June 2026.
- InVestra AI Liquidity Report Package for Anthropic and OpenAI, June 12, 2026.
- Axios, Reuters, The Guardian, Business Insider, and other public-market coverage of Anthropic and OpenAI confidential IPO filings and 2026 funding activity, reviewed June 12, 2026.
- SEC Rule 144 and Form 144 guidance; IRS and tax-practitioner materials regarding incentive stock options, alternative minimum tax, and qualified small business stock; all planning should be confirmed by qualified counsel and tax professionals.

Use control: SpaceX references should remain anonymized and strategic. Do not disclose individual client outcomes, client identities, securities holdings, or portfolio details without written approval and compliance review.