



INVESTRA FINANCIAL · JACKSONVILLE, FLORIDA

Your Financial Future, Our Expert Guidance

A Jacksonville wealth firm with seasoned professionals and a life partnership approach.

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Who We Are

InVestra Financial is a wealth management firm in Jacksonville, Florida. Founder Erin D. Eiras, CPFA®, CEPA®, has empowered women of Jacksonville and their families for almost two decades.

Our team of nine seasoned Wealth Management Professionals includes advisors, operations specialists, and compliance and financial officers. We do not rely on “learning on the job” advisors. We understand your goals and full financial landscape, then build a holistic strategy.

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Our Approach

We start with understanding, then build a plan that fits your life.

Four steps

- **Goals and Landscape** We first examine your goals and your full financial picture.
- **Comprehensive Strategy** We build a holistic strategy across planning, protection, growth, and transition.
- **Implement and Coordinate** We put the plan into action and work with your other professionals.
- **Review and Adjust** We meet regularly and refine the plan as your life changes.

We call the first meeting a doctor's examination. We call the relationship a life partnership, not a transactional decision. That means we stay with you through career moves, family changes, and the long run.

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What We Do

Plan Build a clear path

- Financial Planning
- Retirement Planning
- Estate Planning
- Education Planning
- Tax Planning

Protect Guard what you have built

- Risk Management & Assessment
- Insurance & Annuities

Grow Manage assets with discipline

- Asset Management (fee-based)
- High Net Worth Wealth Management
- Emerging Investors
- Real Estate Acquisition Advisory

Transition Plan the next chapter

- Business Services
- Business Exit Planning
- Charitable Giving
- Philanthropic Structuring

Women's Wealth

Women are just under thirty percent of all financial advisors as of 2023, according to Pew research. That means many women seek advice from a profession that does not always look like them.

Research from The Global Financial Literacy and Equity Center found 71% of women reported feeling insecure about their level of financial acumen. InVestra's Women's Wealth program meets that feeling with education and a steady plan.

Erin's father was diagnosed with aggressive (GBM) brain cancer. She served as his POA and Trustee. That experience shaped her focus on the "Sandwich Generation" — adults caring for children and parents at once.

Program topics

- "The Power of the Purse"
- "Life's Transitions"
- "The Sandwich Generation"
- "Divorce Planning"

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Our Team

Our team consists exclusively of seasoned Wealth Management Professionals.

Name	Role	Focus
Erin D. Eiras, CPFA®, CEPA®	Founder Private Wealth Advisor	Empowers Jacksonville women and families for almost two decades.
Stephanie Vokral, CFP®, AIF®, CDFA®	Private Wealth Advisor	Certified planning, fiduciary, and divorce financial expertise.
Victoria Hoch, ChFC®	Wealth Advisor	Chartered financial consulting applied to your wealth plan.
Kevin Kelly	Wealth Advisor	Seasoned wealth management guidance.
Donna Stewart	Operations Manager	Keeps operations and client service on track.
Jada Simmons	Branch Office Administrator	Welcomes clients and keeps branch details moving.
Stacey Higginbotham	Senior Branch Office Administrator	Senior branch administration.
Jessica Sexton	Chief Compliance Officer	Oversees compliance so advice stays accountable.
Ashley Worley	Chief Financial Officer	Manages the firm's financial health.

Getting Started

- You call or book — we answer and schedule your first meeting.
- We listen and examine — we compare the first meeting to a doctor's examination, and learn your goals and full financial landscape.
- We build your plan — you receive a holistic strategy and a clear next step.

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