

# Your Financial Future, Our Expert Guidance.

Seasoned professionals, holistic planning, and a life partnership approach.

## At a Glance

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 consists exclusively of seasoned Wealth Management Professionals. We first understand your goals and full financial landscape, then build a holistic strategy — a life partnership, not a transactional decision.

## Why InVestra

**Seasoned Advisors.** Our team consists exclusively of seasoned Wealth Management Professionals, not advisors learning on the job.

**Holistic Planning.** We understand your goals and full financial landscape before we build a strategy.

**Family Office Standards.** Enterprise-grade platforms support family office standards for planning, exits, and philanthropy.

## What We Do

- Financial Planning
- Retirement Planning
- Estate Planning
- Asset Management (fee-based)
- Business Exit Planning
- High Net Worth Wealth Management
- Women's Wealth

## Who We Serve

Women and families building long-term wealth. Business owners preparing for an exit. Executives carrying concentrated positions and deferred compensation. Retirees and high net worth households coordinating estate, tax, and philanthropic goals.

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