

InVestra Media Report

Date: October 20, 2026

Outlet: South Carolina Public Radio

Program: *South Carolina Business Review*

Segment: “Diversifying Your Employer Stock Position”

Host: Mike Switzer

Spokesperson: Stephanie Vokral, CFP®, InVestra

Location referenced: Columbia, South Carolina

Coverage type: Earned media / radio interview / podcast / online article and transcript

Topic: Employer stock concentration, diversification and tax-aware financial planning

Coverage Summary

Stephanie Vokral, a Certified Financial Planner with InVestra, appeared on *South Carolina Business Review* to discuss the financial risks executives and employees can face when a significant portion of their wealth is concentrated in their employer’s stock.

The segment positioned InVestra as a source of expertise on executive financial planning, concentrated equity positions, tax-aware diversification and long-term wealth strategy. Host Mike Switzer framed the discussion around the danger of having both a person’s income and a substantial portion of their net worth tied to the same company.

Vokral explained that executives may accumulate substantial employer-stock positions through restricted stock units, stock options, employee stock purchase plans and shares retained after vesting. She emphasized that although a successful company stock can contribute significantly to wealth creation, excessive concentration creates additional financial risk because an employee's salary, bonus, benefits and investments can all depend on the same organization.

Key InVestra Messages

Diversification protects wealth created through an employer.

Vokral’s central message was that a company may help an executive build wealth, but diversification can help protect it. The interview clearly connected concentrated employer stock with broader financial-planning risk rather than treating diversification purely as an investment-management issue.

Holding vested RSUs is an active investment decision.

Vokral offered a practical framing