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CLIENT RELATIONSHIP SUMMARY (CRS)

SouthState Private Capital Management LLC is registered with the Securities and Exchange Commission as an investment adviser. Brokerage and investment advisory services and fees differ, and it is important for you to understand these differences. View the complete CRS disclosure on this website.

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To earn the Certified Financial Planner®, CFP® certificate a candidate must have at least a bachelor's degree from an accredited college and three years of full-time financial planning experience, complete a final certificate examination, and complete thirty hours of continuing education every two years. All CFP® professionals agree to abide by CFP Board's Code of Ethics and Professional Responsibility and Financial Planning Practice Standards and have voluntarily submitted to the regulatory authority of CFP Board, which can suspend or permanently revoke an individual's CFP® certification if findings of unethical conduct are made.

Certified Financial Planner Board of Standards Center for Financial Planning, Inc. owns and licenses the certification marks CFP®, CERTIFIED FINANCIAL PLANNER®, and CFP® (with plaque design) in the United States to Certified Financial Planner Board of Standards, Inc., which authorizes individuals who successfully complete the organization's initial and ongoing certification requirements to use the certification marks.

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