

Tailored Investment Strategies

Advisory Services



Portfolio Monitoring & Management

Once your assets are invested, the process of monitoring and managing your portfolio begins. At SouthState Investment Services, we will continue to review and evaluate your investment strategy to ensure it remains aligned with your goals. We will also provide investment education and professional guidance through regular meetings and discussions. As your needs change, we will reevaluate your investment strategy and discuss alternatives.

As part of your advisory fee, the following are available to you:

- Asset Allocation Recommendation, Implementation, Monitoring & Rebalancing
- Investment Manager/Mutual Fund Due Diligence
- Insurance Planning, Gap Analysis & Beneficiary Review
- Education Planning & Development of Savings Strategy
- Retirement Accumulation & Income Planning
- Long Term Care Analysis
- Investment Risk Assessment
- Annual review to assess financial plan
- Discuss tax harvesting opportunities
- Update on performance and market outlook

Transparent & Ongoing Communication

To aid in the portfolio management process and to ensure you remain in-the-know on the status of your investments, we offer numerous forms of reporting and communication:

- Quarterly performance reports
- Monthly statement of holdings
- Online account access
- E-newsletter

Providing advice and guidance for your financial future is at the core of what we do.

Let us know what is most important to you and we will work diligently to provide outstanding service and communication. For more information, reach out to your Financial Consultant or call (800) 382-0564.

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Not Insured by FDIC or Any Other Government Agency	Not Bank Guaranteed	Not Bank Deposits or Obligations	May Lose Value
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