

Providing Financial Advice & Guidance

Investment Services



It Starts With a Conversation

Wherever you are along your financial journey, we're here to provide advice and guidance when you need it most. At SouthState Investment Services, we strive to deliver exceptional financial insight and personalized service to help position you toward preserving and growing your wealth. Your dedicated Financial Consultant is committed to listening closely and taking the time to develop a comprehensive investment strategy driven by your personal needs and goals including:

- Asset Allocation & Portfolio Monitoring
- Retirement & Income Planning
- Investment Strategies
- College Savings Plans
- Tax-Efficient Investing
- Advisory Services

Innovative Financial Planning

Today's market complexity and volatility demand specialized attention with a holistic approach to wealth management. In addition to traditional investments, we are able to utilize top industry research and money managers to help you create a customized portfolio that incorporates a wide range of investment strategies that may include:

- Stocks & Bonds
- Government Agency Issues
- Mutual Funds
- Fixed & Variable Annuities
- Market-Link CDs
- 401k Options
- Life Insurance
- Long Term Care Insurance

A Trusted Partner

Building a financial plan designed to address your long-term goals and financial dreams is an important step in planning for the future. Whether you're thinking about the best time to retire, funding your child or grandchild's education or looking for strategic guidance on diversifying your portfolio, we're here to serve as a trusted partner to guide you along your journey. **To learn more or to schedule an appointment, call us at (800) 382-0564.**

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