

Providing Guidance For What's Next



What's On Your Mind?

Financial questions and concerns can occur at any stage of life. Check off any of the below questions that worry you so we can help address your concerns.

Life Events

- What should I do in times of volatility?
- What do I do when a loved one dies?
- I'm getting divorced. What happens to my assets?
- If I sell my business, will I have enough to maintain my lifestyle and leave the legacy I want to leave?
- Will my loved ones be financially sound if something happens to me or my income?
- What happens to my 401(k) plan when I leave the company?
- If I'm unable to make important decisions, how can I make sure that my financial affairs are appropriately managed?

Retirement

- Am I saving enough for retirement?
- Am I making the right decisions when it comes to my employer's retirement plan?
- I'm retiring soon. What do I need to do now?
- Will my money last through retirement?
- How do I manage all of my retirement plans?
- Do I need long term care insurance?
- When can I start drawing income and how do I do it effectively?

Education Planning

- What are my college savings options?
- How much do I really need to save for college?
- When should I start planning?
- Will I qualify for financial aid? Where do I start?

Eldercare

- How do Social Security and Medicare work?
- What are my options for caring for an elderly loved one?
- How can I safeguard my loved one's assets?

Leaving a Legacy

- How do I ensure my wishes are followed when I pass away?
- Have I appropriately provided for my loved ones?
- How can I effectively transfer wealth to the next generation?
- I have a loved one that doesn't manage their finances well. How can I provide for them while also protecting my assets?
- How can I make certain those institutions/charities that are important to me continue to benefit from my giving?

For more information, reach out to your local SouthState Investment Services Financial Consultant or call (800) 382-0564.

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