South State Wealth Lines of Business

Investment Services

A department of South State Bank that offers a variety of investment products and services through their registered representatives using the LPL Financial Platform (Broker-Dealer). Services provided by Investment Services focus on each client's unique investment situation, designing a plan with their financial success and risk tolerance in mind.

Private Wealth

A department of South State Bank that offers traditional and enhanced trust and advisory services to individuals, families, private foundations, and institutions related to trust, wealth transfer, financial and estate planning, estate administration, and asset and investment management.

South State Advisory, Inc.

A wholly-owned subsidiary of South State Bank that is a Registered Investment Advisor offering investment advice and portfolio management services to both business and personal clients.

South State Retirement Plan Services

A doing-business-as name of South State Advisory that offers retirement plan administration, recordkeeping, advisory, and consulting.

Minis & Company

A doing-business-as name of South State Advisory that manages investments for individuals, trusts, families, or institutions by tailoring investment portfolios to meet a client's specific financial needs.

Each Investment Service Account descriptions and fee schedules are saved within the CRA Public File for review.

*****Please be advised that account fees vary based upon such factors as account balances, plan size, number of plan participants or other factors not mentioned herein.**

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