Investment Services

Investment Services 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

Private Wealth's principal business is offering 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.

American Pensions

American Pensions offers retirement plan administration, recordkeeping and advisory services.

South State Advisory, Incorporated

South State Advisory (f/k/a First Southeast 401k Fiduciaries, Inc.) is a Registered Investment Advisor offering investment advice and portfolio management services to both business and personal clients. It also provides retirement plan investment advice through its d/b/a South State Retirement Plan Services.

Minis & Company

Minis & Company is a Registered Investment Advisor 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.**