FIDUCIARY SERVICES

origin

- Our Case Managers offer compassionate and experienced asset management to individuals with cognitive, intellectual or physical disabilities.
- We provide peace of mind to individuals when a professional Trustee or Personal Representative is necessary.
- Family Services, Inc DBA Origin SC is a 501(c)3 nonprofit organization serving South Carolina since 1888.

your path to Financial Stability starts here

Asset management to ensure needs are met	Protection from neglect, financial abuse and isolation	Licensed, bonded and accredited

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PROFESSIONAL FIDUCIARY SERVICES

Conservator

The Probate Court appoints us as Conservator when an individual is deemed incapacitated and unable to manage their financial affairs due to physical or mental disability. We secure and manage the assets of the protected individual to safeguard them from exploitation and to ensure their financial needs are met.

Trustee

Either an individual's Trust or the Court appoints us as Trustee when a professional third-party is desired. We manage and administer the assets of trust property according to the terms of the trust and act solely for the benefit of the trust beneficiary.

Personal Representative

Either an individual's Last Will and Testament or the Court appoints us as Personal Representative, usually due to unavailable or unsuitable family or friends. All estates are administered according to the terms of the Will and the laws of South Carolina.

VA Fiduciary

The Department of Veterans Affairs appoints us as Fiduciary when they determine that a Veteran is unable to responsibly manage their benefits due to mental or physical disability. We oversee their benefits to ensure they maintain housing and a stable environment.

We Are Unique

- All Case Managers are licensed credit counselors
- Accredited by National Guardianship Association, Counsel on Accreditation and Better Business Bureau
- Routine internal and external audits and accountings
- Licensed CPAs and Real Estate Brokers on staff
- Corporate bonded and insured

Our Services

Our Case Managers provide a professional yet personal approach with all of our clients. Our basic responsibilities include:

- Secure, manage and invest assets;
- Develop and implement a financial management strategy;
- Create a monthly budget, pay bills and provide for personal spending allowance;
- Apply for any available benefits (i.e., VA, Social Security, Medicaid);
- Advocate on behalf of clients with creditors to assist with payment of debts;
- Freeze credit with all three credit agencies to stop exploitation on adult conservatorships;
- Provide options for pre-need planning of funeral arrangements;
- Purchase or sell property ONLY when needed with court approval;
- Prepare annual accountings.

Who We Can Help

- An individual who needs protection from neglect, financial abuse and isolation
- An individual whose family or friends do not have the capability to assist with their financial responsibilities
- An individual who wants to ensure their wishes are honored according to their estate plan