

FIDUCIARY SERVICES



# your path to Financial Management starts here

Asset  
management  
to ensure  
needs are met



Protection  
from neglect,  
financial abuse  
and isolation



Estate plan  
administration  
to ensure wishes  
are honored



# PROFESSIONAL FIDUCIARY SERVICES

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## 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.

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## 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.

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## 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.

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## Power of Attorney



An individual appoints us to act as Agent when help is needed to manage financial affairs and a professional is preferred, usually for privacy or protection of assets. We follow the terms of the POA and act solely for our client's benefit.

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## 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, invest and manage assets;
- + Develop and implement a financial management strategy;
- + Create a monthly budget, pay bills and provide for personal spending allowance;
- + Prepare annual accountings and file required tax returns;
- + Apply for any available benefits (i.e., VA, Social Security, Medicaid);
- + Advocate on behalf of clients with creditors to assist with payment of debts;
- + Assist with pre-need planning of funeral arrangements;
- + Purchase or sell real or personal property, as necessary.



+ Our Case Managers offer compassionate and experienced asset management.

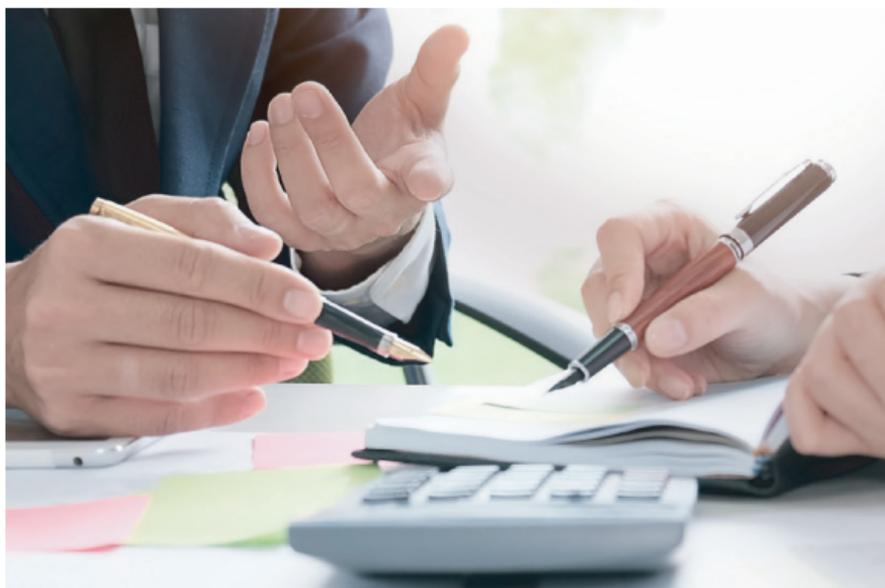
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+ We provide peace of mind to individuals when a professional Trustee, Conservator, Personal Representative or Attorney-in-Fact is preferable.

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+ Family Services, Inc DBA Origin SC is a 501(c)3 nonprofit organization serving South Carolina since 1888.

We are a licensed, bonded and accredited agency.



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