



FRASER ALLPORT

The Total Advisor™

For All Your Financial Needs

A Fiduciary and Certified Estate Planner™
Serving Clients since 1982



Proud supporter of



Fraser Allport is a
Continuing Education
Provider



Ask Fraser about his
Estate Planning Services



To learn more about Fraser Allport's experience, credentials and services, please visit:

www.fraserallport.com
specialist.fraserallport.com
<https://bit.ly/2KPVQGS>

This Free "Total Money Planning" Workshop focuses on Getting Your House in Order by reviewing every aspect of your Financial Life. Take Care of Yourself, your Family, Church, Charity, and Your favorite Causes. Protect yourself now ... while you are still healthy and able. This is proactive Legacy Planning.

This Free Workshop will also address your Lifetime Health Care Needs, and how to fund them? Medical bills are a big issue, and big dollars. When doing Retirement and Estate Planning ... Be sure to include a realistic cost for your Lifetime **Out of Pocket Medical Expenses**.

How are you going to fund your future Out of Pocket Medical Costs?

Be Proactive and Wise. Knowledge is only Power if you act on it.
Be Good to yourself, your Family, and your favorite Causes.
An ounce of prevention is worth a pound of cure.
Do The Right Thing. Leave A Legacy. Not A Mess.
Get Your House In Order ... Today.

Invite Fraser to come speak at your Facility or Club.
Fraser also enjoys visiting with Folks in their Homes.

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Serving All of Florida, Statewide. Fraser can work in all 50 States.

The Total Advisor, LLC is an Independent Retirement, Health Insurance, Tax and Estate Planning Firm owned by Fraser Allport. Advisory services through Coppell Advisory Solutions, LLC dba Fusion Capital Management, an SEC registered investment advisor, transacting business in states where it is registered or excluded or exempted from registration. SEC registration does not constitute an endorsement by the Commission and does not speak to advisors skill or ability. All investment strategies have the potential for profit or loss. Florida License # A004461.

FREE “ TOTAL MONEY ” PLANNING WORKSHOP

10 easy steps to Total Financial Wellness

Integrating Social Security, Retirement Planning, Health Care Expenses, Income Tax and Estate Planning into a Total “ Life and Legacy Plan ” for those already in Retirement, and those planning to Retire.

Do you know for sure if Your House is in Order?

- Do You have a Will or a Trust ?
- Who knows where it's located ?
- What is the *difference* between a Will and a Trust ?
- Do you have a Power of Attorney and a Living Will ?
- Have you named an Executor or Successor Trustee ?
- Do your documents conform to current Florida Law ?
- What State is your legal residence for Estate purposes ?
- Do you have HIPPA Forms and a Health Care Directive ?
- Are all of your Documents and Beneficiary Forms current ?
- If you are a Snowbird, do your documents conform to the Laws of both States ?
- If you are in a Second Marriage, or a Blended Family, you have even more issues.
- Do You have a Plan already in place to provide Home Health Care so that you can remain independent in your own home ? Be Free, in your own Home, living Your Life, your way.

These are all Big Questions, and Big Issues for You.

Are you managing, or ignoring, your affairs?

In short... Are You Leaving a Legacy, or Leaving a Mess?

As a Certified Estate Planner™, **Fraser Allport** can help you Get Your House in Order with a free “ Total Money ” Planning **Workshop onsite at your Location, or one-on-one in your Home.**

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This Free Workshop will help you with the following issues:

- This Free Workshop will help you Get Your House in Order. Decide right now to update your Estate Planning documents. This first step brings you and your entire Family a sense of security and certainty. This Workshop helps with your financial Peace of Mind and final Legacy
- This Free Workshop clarifies the **differences** between a Will and a Trust.
- This Free Workshop will examine how to maximize Social Security for you and your Spouse. This is for both Retirees, and Pre-Retirees alike. Learn how to truly maximize your Social Security check.
- This Free Workshop may help you to reduce or eliminate unnecessary Taxes, Court Costs, Family Feuds, Will Contests, and Lawyers' fees. Have you ever heard a *Good Story* about Probate ?
- This Free Workshop will discuss ways to reduce your Income Taxes.
- This Free Workshop will show you how to control the distribution of your Assets, both during your Life, and even after your Death.
- This Free Workshop will explain Medicaid Trusts : Their benefits and their pitfalls.
- This Free Workshop is helpful for Blended Families, Divorced Singles, Widowed Singles, Second Marriages, and Special Needs Families.
- This Free Workshop will discuss both Financial and Medical Powers of Attorney to manage your affairs if you are incapacitated.
- This Free Workshop will examine if you are subject to Federal Estate Taxes, and how to minimize them.
- This Free Workshop could help you avoid Estate Planning mistakes, especially with transferring Assets while you are alive.
- This Free Workshop will discuss your various choices for personal " Final Plans and Expenses." This is important.
- This Free Workshop will show you how to protect your Independent Lifestyle, in your own Home, with Home Health Care Service Plans. Don't be alone, or a burden, or forced into a Nursing Home.
- This Free Workshop will offer you a Complimentary Risk Analysis of your current Investments. It's too late in your Life to lose money. How much Risk, and Loss Potential, do you really have in your Portfolio ?
- This Free Workshop will teach you the critical importance of having an integrated " Life Plan " that comprehensively includes all of the above issues holistically.

**Learn more about Your Money with Fraser.
Smart People get Smart about their Money.**

" Home Health Care Plans " Workshop

According to The Department of Health and Human Services, 70% of Seniors will need some form of Home Health Care in their lifetime.

Fact: nearly three out of four Seniors will eventually need Home Health Care services. Think of the probabilities and cost of both you and your Spouse needing Home Health Care, at the same time !

Fraser also does a second Workshop on " Home Health Care Plans ". Buy protection now, while you are healthy and you still qualify.

Call Fraser at 386.882.6256

to schedule both of his Presentations:

- 1) " Total Money " Planning. A holistic " Life Plan "... and also:
- 2) " Home Health Care Service Plans ".

Call Fraser about doing a Complimentary Presentation onsite for your Church, Charity, Group, Club, HOA or Condo' Association, or privately, one-on-one in your Home.

Fraser is proud to be a provider to Embry-Riddle University, and Rollins College Perks Program.



Prudent Estate Planning is an essential part of a comprehensive “ Life Plan ” and Legacy

Having a plan for what happens to all of your Assets after your Death is not what you think about daily. But Estate Planning is a necessity. Your Life's work is at stake. Take some time on this topic to plan Wisely. Make a promise to start today.

You have worked hard your whole Life for what you have. Do you really want Probate Court, Judges, Lawyers, and The State of Florida to make decisions about the management and inheritance of your Assets ? That can happen. But you can take control by being proactive and informed.

Do you want to Leave A Legacy, or Leave A Mess ?

Sometimes, people think that Estate Planning is just for very wealthy people. Not so. Everyone eventually dies, and your Estate Plan helps ensure that your loved ones, dependents, and favorite causes are financially provided for upon your Death, or in the event of your incapacity.

Call Fraser at 386.882.6256

for your Complimentary
Phone Consultation.

Fraser Allport is ... The Total Advisor.™

“ Smart Money, for Smart People. ”

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