

# ***Fraser Allport***

**A Fiduciary and Certified Estate Planner**

**Owner of : The Total Advisor, LLC**

**A turnkey Retirement, Social Security, Health Insurance,  
Tax and Estate Planning Firm.**

**Specializing in The Florida Retirement System DROP**

**Serving Clients since 1982 - 39 Years of Excellence.**

**Serving all of Florida**

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**Fraser's Bio' and DROP Library of articles are online at :**

**[www.fraserallport.com](http://www.fraserallport.com)**

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**2 Oceans West Boulevard**

**Daytona Beach Shores, FL. 32118**

**386.882.6256**

# Turnkey Service. One Stop.

Fraser will help You with :

- Where to invest your DROP Lump Sum funds ?
- Medicare choices if you are 65 years or older ?
- Health Insurance choices if you retire under age 65 ?
- Paying the correct amount of Income Taxes. Don't over-pay your Income Taxes. What a waste of money.
- The best Social Security election choice for your situation ?  
Social Security is not One Size fits All, and decisions are irrevocable after 13 months.
- Completing all of your DROP FRS Exit Forms with you. One on One. Together as a Team. No worries about your Forms. Consider them DONE.
- Designing a safe and sound financial “ Life Plan ” that serves you well until your passing.
- Leaving A Legacy vs. A Mess : Designing an Estate Plan : Wills, Trusts, Powers of Attorney, Health Care Directives, etc.

**Together, as a Team ... we will focus on your**  
**FOUR BIGGEST RETIREMENT ISSUES**

- 1) Fraser will help you complete all of your FRS DROP forms accurately and On Time.**
- 2) Fraser can help you with your choices for where to invest your DROP Lump Sum and other Assets**
- 3) If you are under age 65 – Fraser can help you with Health Insurance.**

**Fraser can also help you understand your Medicare choices :**

**Original Medicare, Advantage Plans, Part D Drug Plans, and Medicare Supplements  
( aka – Medi-Gap )**

- 4) Fraser can help you make the best Social Security election for your specific situation**

**Fraser is a Certified Estate Planner <sup>TM</sup>**

**[Please see Fraser's Estate Planning site](#)**

**Fraser can help you with Wills, Trusts, Powers of Attorney,  
Health Care Directives, and Final Expense planning ...**

**so that You ...**

***Leave A Legacy ... not A Mess !!!***

## **SCHEDULE YOUR COMPLIMENTARY CONSULTATION WITH FRASER**

**Planning is a verb. Knowledge is only Power if you act on it.  
Get Proactive about Your Money ... and You'll have more of it.**

**Fraser is a Fiduciary and an Independent Advisor – He only works for himself, and you.**

**Trust your Retirement, Tax & Estate Planning to a seasoned Professional with 39 Years of experience.**

**You are invited to schedule a Complimentary Phone / Zoom call, or in-person with Fraser to discuss your financial needs and goals.**

**<https://calendly.com/fiduciaryadvisor>**