Fraser Allport – Fiduciary

Owner of The Total Advisor, LLC
For All Your Financial Needs

" For 41 Years ... Fraser is The Advisor that You Keep "

Investing Wisdom.

- Seek professional advice. Do not go it alone. Money Matters are not DIY. Our joint Goal is " Total Financial Wellness " in all aspects of Your Life.
- For successful Projects in Life ... Start early. The sooner that you start, the better the outcome.
- Be the Quarterback of your Financial Team. Get involved, Get Educated, Get Smart. Participate and delegate, but never abdicate. Get in your own " Financial Huddle ".
- Get Smart with Your Money, and you will have more of it. Makes sense, right ?
- You were smart enough to make the money. You are smart enough to be involved in managing it. Fraser takes the time to teach. He is a Fiduciary and Educator.
- Starting is the hardest part of anything in Life. Just start where you stand. Fraser can help you to get started. You can easily schedule time with him below.
- Seek an Independent Fiduciary with Experience and comprehensive Services for an integrated and holistic Plan.
- Like Life itself, make the effort. Put in the time to become an Educated Consumer.

For your no obligation Complimentary Consultation, call Fraser Allport, specializing in FRS DROP and FERS, Social Security, Medicare, Income Taxes, IRA, 401k, 403b, Def. Comp' Plans, and Estate Planning.

386.882.6256

www.calendly.com/fiduciaryadvisor

" All Knowledge comes from Experience. " - Albert Einstein

1982 – 2023
41
YEARS OF EXCELLENCE
FRASER ALLPORT

www.fraserallport.com

Experience Matters

Fraser Allport specializes in FRS DROP and FERS, Social Security, Medicare, Income Taxes, IRA, 401k, 403b, Def. Comp' Plans, and Estate Planning.

Fraser has been in Business for 5 Decades.

Experience Matters.

Retirement Planning at any age

Your Social Security Claiming Strategies

Deferred Comp' & 403(b) plans

IRA, ROTH IRA, ROTH Conversions

Specializing in FERS and FRS DROP

Medicare and Health Insurance < 65

Estate Planning – Wills, Trusts, etc.

Income Tax Planning

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FRASER'S SERVICES

A seasoned Fiduciary with a diverse set of skills.

- Medicare
- Annuities
- Tax Free Income
- Longevity Planning
- Retirement Planning
- Income Tax Planning
- 403(b) and 401(k) Plans
- Investing in Mega-Trends
- Tele Health Medical Plans
- Medicare Advantage Plans
- Medicare Supplement Plans
- ROTH and ROTH Conversions
- Real Estate Investments Trusts

- 457 Deferred Compensation Plans.
- Fraser is a Certified Estate Planner ™.
- FERS and FRS DROP Retirement Plans
- Long Term Care and Home Health Care
- Tax Deductible ERISA Retirement Plans
- Mutual Funds vs. Exchange Traded Funds
- Fraser is a National Social Security Advisor ®
- Tax Free benefits of Cash Value Life Insurance
- Maximizing Social Security Claiming Strategies
- Licensed by Florida's DBPR to teach CE to CPAs
- Federal Employee Retirement System Specialist
- Women and Men have different Retirement Needs
- Financial Wellness Workshops for C Suite and Employees

Fraser Allport

A Fiduciary and Certified Estate Planner ™
Owner of : The Total Advisor, LLC

" For 41 Years ... Fraser is The Advisor that You Keep "

A Retirement, Social Security, Medicare, Income Tax, and Estate Planning Firm

Serving Clients Since 1982.
41 Years of Excellence.

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To view all of Fraser's articles and seminars, visit

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Experience Matters

Proud Member
FICPA
Florida Institute of Certified Public Accountants

Fraser Allport is a Continuing Education Provider

Ask Fraser about his Estate Planning Services

NSSA NATIONAL SOCIAL SECURITY ADVISOR CERTIFICATE

National Wellness Institute

Proud Supporter of
FLORIDA SHERIFFS YOUTH RANCHES

FLORIDA SHERIFFS ASSOCIATION
Proud Supporter

Proud Member of
Daytona Regional Chamber of Commerce
ACCREDITED

iHeartRADIO
Former Radio Host

Federal Employees Retirement System

Medicare USA

VOLUSIA COUNTY SCHOOLS
Employee Discount Program Member 2022-2023

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

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