# TOTAL FINANCIAL WELLNESS

As a Fiduciary, my first responsibility to my Clients is to protect and preserve your Principal, and then generate steady Income from it. " Don't Lose Your Nest Egg " is My Job # 1 for you. It is too late in Your Life to lose Money !

After 41 years as an Independent Financial Advisor and Business Owner, I have created a 5 Step System for my Clients for " Total Financial Wellness " in every facet of their Money and Health Care, including Medicare, Income Tax and Estate Planning, and Social Security. All to secure Your Life's work and Legacy.

My methodology is a comprehensive approach to integrating all aspects of your Financial Life into one holistic " Life Plan ". The concept of complete " Total Money Planning " can help you attain financial as well as psychological Security and Wellness in Retirement.

The Goal is for you to have true financial " Peace of Mind " in Retirement, where you don't worry about your Money. You spend and enjoy it, knowing that your Money and your Legacy are secure. The psychological benefits of having financial Peace of Mind in Retirement are comforting and priceless. It's all about Wellness in every facet of your Life.

My 5 Step " Life & Legacy Plan " is customized for you, based on your situation. Like the four legs of a table as a sturdy foundation, I focus on four core areas of your Money : Retirement Planning, Health Care Expenses, Income Tax and Estate Planning. Taking good care of your Money, your Health Care needs, and your Legacy is what I do as your financial shepherd. In sum, my " Life and Legacy Plan " coordinates and then synergizes all your Financial, Tax and Estate Planning issues, like spokes in a wheel. So that you can enjoy Your Money, Your Health, Your Independence and Your Legacy, and not worry about them, or worse ... lose them.

I do not have the space here to fully explain each of my 5 Steps. So I offer you a simple no obligation Complimentary Consultation to learn my proprietary System, and how it can benefit you. Your Complimentary Consultation is about your Agenda : Questions, Needs, Problems, Risks, Goals, and Your Legacy. Anything that you want to talk about. After listening to your situation, I then customize my System for you.

***" Get Smart about Your Money ... and You'll have more of it. "***

**Schedule Your no obligation Complimentary Consultation with Fraser :**
**386.882.6256 or www.calendly.com/fiduciaryadvisor**


**FRASER ALLPORT - The Total Advisor ™**

**A Fiduciary and Certified Estate Planner ™**
**Owner of The Total Advisor ™, LLC**
**An Independent Retirement, Social Security, Medicare,**
**Income Tax and Estate Planning Firm**

www.fraserallport.com | info@fraserallport.com
Office: **386.256.7300** | Mobile: **386.882.6256**


***Serving Clients Since 1982***

1982 – 2023
41
YEARS OF EXCELLENCE
FRASER ALLPORT

*Experience Matters*

# FRASER ALLPORT

## The Total Advisor ™

*For All Your Financial Needs*

1982 – 2023 41 YEARS OF EXCELLENCE FRASER ALLPORT

*Experience Matters*

A Fiduciary and Certified Estate Planner ™
Serving Clients since 1982

Fraser Allport has been serving his Clients since 1982. He has created a 5 Step System for his Clients for " Total Financial Wellness " in all aspects of their Money. His methodology is a comprehensive approach to integrating your Money Matters and Health Care into one holistic " Life Plan ". The goal of " Total Money Planning " is to help you attain financial as well as psychological security in Retirement.

The Goal is for you to have true financial " Peace of Mind " in Retirement, where you don't worry about your Money. You spend and enjoy it, knowing that your Money and your Legacy are secure. The psychological benefits of having financial Peace of Mind in Retirement are comforting, and priceless.

Fraser's 5 Step " Life & Legacy Plan " is customized for you, based on your situation. Like the four legs of a table as a sturdy foundation, Fraser focuses on four core areas of your Money : Retirement Planning, Health Care Expenses, Income Tax, and Estate Planning. Taking good care of your Money, your Health Care needs, and your Legacy is what Fraser does as your Fiduciary and financial shepherd.

In sum, Fraser's complete " Life and Legacy Plan " coordinates and then synergizes all of your Financial, Health Care, and Estate Planning issues, like spokes in a wheel. So that you can enjoy Your Money, Your Health, Your Independence and Your Legacy, and not worry about them. Or worse ... lose them.

***Fraser has been Self-Employed for 41 Years,***
***and can do business in all 50 States.***

Read about Fraser's Biography, Experience, Credentials, and Services.
See how Fraser can help you with your financial future at

**www.FRASERALLPORT.com**

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# Fraser offers the following Services

- Medicare
- Annuities
- Traditional IRA
- 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
- Financial Wellness Workshops for C-Suite and Employees

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***" FOR 41 YEARS ... FRASER IS THE ADVISOR THAT YOU KEEP "***


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***Serving Clients Since 1982 - 41 Years of Excellence***

***Fraser has achieved the coveted " National Social Security Advisor ® " Certificate***

***" All Knowledge comes from Experience. " – Albert Einstein***

# FRASER ALLPORT - Fiduciary
## Owner of The Total Advisor, LLC ™

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FRASER ALLPORT
*Experience Matters*

An Independent Retirement, Social Security, Medicare,
Income Tax and Estate Planning Firm

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

For his Clients, Fraser Allport is " The Total Advisor ", specializing in Retirement, Income Tax and Estate Planning, plus Social Security and Medicare. Fraser also does Health Insurance for those who are under age 65. Fraser is experienced in FERS, FRS DROP, IRA, ROTH IRA, 401(k), 403(b) and 457 Deferred Compensation Plans.

Fraser's holistic and comprehensive approach is bona fide " Total Money Planning " for Individuals and Business Owners. Like a puzzle, all your financial pieces get integrated. Fraser synergizes and harmonizes your Finances. Think of your Finances like your Diet : Healthy, Holistic and Balanced.

Born in Connecticut in 1959, Fraser graduated in 1982 from Georgetown University's School of Foreign Service in Washington, D.C., where he studied Business, History, and Economics.

Fraser has been a Self-Employed Entrepreneur since the day that he graduated from Georgetown, serving Clients as an Independent Financial Professional for more than five decades.

Fraser is the Owner of The Total Advisor, LLC, an Independent Retirement, Social Security, Medicare, Income Tax and Estate Planning Firm in Daytona Beach Shores, Florida. Fraser is also an Investment Advisor, a Fiduciary for his Clients, and a Certified Estate Planner ™.

You can read Fraser's full Biography at : **www.fraserallport.com**

**To Schedule 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.**

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

**www.fraserallport.com**

View Fraser's videos on his YouTube channel

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Proud Member
FICPA Florida Institute of Certified Public Accountants

Florida dbpr
Fraser Allport is a Continuing Education Provider

NICEP National Institute of Certified Estate Planners
Ask Fraser about his Estate Planning Services

NSSA National Social Security Advisor Certificate

Proud Member of the National Wellness Institute

Proud Supporter of
Florida Sheriffs Youth Ranches

Florida Sheriffs Association
Proud Supporter

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Daytona Regional Chamber of Commerce
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Former Radio Host

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Employee Discount Program Member
2022-2023

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