FRASER ALLPORT
The Total Advisor ™
For All Your Financial Needs

1982 – 2024
42
YEARS OF EXCELLENCE
FRASER ALLPORT
Experience Matters

A Fiduciary and Certified Estate Planner ™
Serving Clients since 1982

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

Fraser is the Owner of The Total Advisor, LLC, an Independent Retirement, Social Security, Medicare, Long Term Care, Income Tax, and Estate Planning Firm in Daytona Beach, Florida.

Fraser also specializes in 401k, 403b, and 457 Deferred Compensation Plans, ROTH and Traditional IRAs, and Florida's DROP. Fraser can also help you with your U.S. Government FERS and TSP. Fraser's holistic and integrated approach is " Total Money Planning " for Individuals and Business Owners. Like a puzzle, all your financial pieces need to be fully integrated.

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 Business Owner since the day that he graduated from Georgetown, serving Clients as an Independent Financial Professional for five decades now.

Fraser is an Investment Advisor Representative, a Fiduciary for his Clients, and a Certified Estate Planner ™. Fraser can also help you with your Medicare and Social Security questions.

As a Certified Estate Planner ™, Fraser can provide education and assistance, together with your Attorney, regarding your Will, Trust, Powers of Attorney, Living Will, Final Expenses and Legacy Planning for loved ones and Charities.

Fraser is also licensed by Florida's DBPR to teach CE to CPAs.

Fraser's 42 Years of Experience gives him the skills and resources to meet all your Financial Needs, both Personal and Business. Fraser's responsibility is to shepherd and safeguard your Money with his veteran understanding of History, Economics, and Global Markets. Plus, Fraser is an Independent. *He only works for himself, and for You.*

Fraser advises Clients on how to Retire with security and peace of mind. Fraser builds his Clients a comprehensive " Life Plan " that includes Retirement, Social Security, Medicare, Long Term Care and Home Health Care, Income Taxes, Estate Planning, Longevity Planning, the FRS DROP, and the U.S Government's FERS and TSP.

As an Investment Advisor and Fiduciary, Fraser's Rule # 1 is simple : Protect your Principal, which will help to safeguard your standard of living and Peace of Mind in your Retirement.

Please see Fraser's Credentials, Skills and Services at : www.FraserAllport.com

" All Knowledge comes from Experience. " – Albert Einstein

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

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Memberships & Affiliations

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

Protecting Your Principal is Fraser's #1 Priority.
" Be Safe and Smart With Your Money "

Fraser has achieved the prestigious " National Social Security Advisor ® " Certificate, and can help you with your Social Security questions and Claiming Strategies.

Fraser is also licensed in Medicare. He can help you with Medicare Supplements, Advantage Plans, and Prescription Drug Plans.

Fraser is an Instructor for the National Council of Financial Educators, which is a 501(c)(3) Non-Profit. Fraser teaches a variety of in-person Educational Course. Please see : **https://FraserAllport.com/cofe**

Fraser has volunteered as a mentor at The Women's Business Center at the Florida Institute of Technology in Melbourne, FL. He has also taught at The Corporate and Community Training Institute at Indian River State College.

Fraser has taught " Financial Wellness in the Workplace " to Corporate Executives, HR Managers, and Employees. His Courses are onsite and online.

Fraser is trained in educating Employees about their Finances. He provides financial classes pro bono to Police Officers, Fire Fighters, EMS, Teachers, Federal Employees, and those in the Florida DROP Retirement Plan.

He has also served as an Instructor at The Indian River Sheriff's Office for his " Financial Wellness in The Workplace " Course, and has worked with Law Enforcement and Firefighters his entire Career.

Fraser is licensed by Florida's Department of Business and Professional Regulation to teach Continuing Education courses to Certified Public Accountants.

Fraser is a supporter of Florida Sheriffs Youth Ranches and Take Stock In Children, and has served as an Ambassador for Florida's Guardian Ad Litem Program, which helps children at risk.

Schedule your no obligation Complimentary Consultation with Fraser Allport at :

www.calendly.com/fiduciaryadvisor

Fraser can help you with all of your Money questions, problems and needs.

Fraser works Statewide in Florida, and can work in all 50 States.

www.FraserAllport.com

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" For 42 Years ... Fraser is The Advisor that You Keep "

Below Are The Topics That Fraser Teaches :

- Income Tax Planning : Are you needlessly overpaying your Income Taxes ?
- Estate Planning : Wills, Trusts, Powers of Attorney, Health Care Directives.
- Health Insurance, Medicare, Long Term Care, and Home Health Care.
- Protecting your Principal in today's volatile Stock and Bond Markets.
- Fraser is a Specialist in the Florida Retirement System's DROP Plan.
- Building a Retirement Portfolio for Safety, Income, and Longevity.
- Licensed by Florida to teach Continuing Education to CPAs.
- Medicare, Medicare Supplemental, Prescription Drug Plans.
- 457 Deferred Compensation, 401(k) and 403(b) Plans.
- Fraser is a certified National Social Security Advisor ®.
- Understanding a ROTH IRA and ROTH Conversions.
- Financial Wellness in The Workplace for Employees.
- Staying in your own home with Home Health Care.
- How to earn Tax Free Income in America today ?
- Why work with a Fiduciary instead of a Broker ?
- Comprehensive Planning for Business Owners.
- Your U.S. Government FERS and TSP.

Please watch Fraser's Educational videos on his YouTube channel at www.FraserAllport.com/youtube

Fraser has served his Clients for 5 Decades.

Fraser has always worked for himself, and for his Clients, not some Big Company or Big Bank. The only name on Fraser's business card is his.

Please read Fraser's Client reviews on Google. Fraser has built his Business and lasting Client relationships on the Principles that he was raised on :

Be Honest and Work Hard.

Always Keep Your Word.

Finish What You Start.

Treat People Right.

After 42 Years in Financial Services, Fraser has either seen it, or done it, or knows where to find it for you. As an Independent Financial Advisor and Fiduciary who owns his Company, Fraser has the skills, resources and freedom to find you the best Investments available, and for the least cost.

Schedule your no obligation Complimentary Consultation with Fraser Allport at :

www.calendly.com/fiduciaryadvisor

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Memberships & Affiliations

FLORIDA SHERIFFS ASSOCIATION

Proud Supporter

Proud Supporter of

FLORIDA SHERIFFS YOUTH RANCHES

iHeartRADIO

Former Radio Host

Medicare USA

COFE

Council of Financial Educators

AN IRS-APPROVED 501(C)(3) NON-PROFIT ORGANIZATION

Google Reviews

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FRASER OFFERS THE FOLLOWING SERVICES :

- Medicare
- Annuities
- Traditional IRA
- Tax Free Income
- Longevity Planning
- Income Tax Planning
- Retirement Planning
- 403(b) and 401(k) Plans
- Medicare Advantage Plans
- Medicare Supplement Plans
- FRS DROP Retirement Plans
- ROTH and ROTH Conversions
- 457 Deferred Compensation Plans
- Fraser is a Certified Estate Planner ™
- Your U.S. Government FERS and TSP
- Risk and Fee Analysis of your Portfolio
- Wealth Strategies for Business Owners
- Long Term Care and Home Health Care
- Tax Deductible ERISA Retirement Plans
- 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
- Professionally Managed Stock and Bond Portfolios
- Women and Men have different Retirement Needs
- Financial Wellness Workshops for C Suite and Employees

Fraser has been in Business for 42 Years
He will be here when You need him.

Because of his knowledge and experience ...
Fraser Allport is ... The Total Advisor ™
For all your financial needs.

**Schedule your no obligation Complimentary Consultation
with Fraser Allport at :**

www.calendly.com/fiduciaryadvisor

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Income Tax and Estate Planning Firm**

www.FraserAllport.com | retirement@fraserallport.com

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The Total Advisor, LLC is an Independent Retirement, Social Security, Medicare, Long Term Care, Income Tax and Estate Planning Firm owned by Fraser Allport. Fraser Allport is not associated with The State of Florida. 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 Advisor's skill or ability. All investment strategies have the potential for profit or loss.

Florida License # A 00 44 61 and L 09 47 754

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