Fraser Allport – Fiduciary

Owner of The Total Advisor, LLC

For All Your Financial Needs

" For 42 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.

Schedule your no obligation Complimentary Consultation with Fraser Allport at

www.calendly.com/fiduciaryadvisor

" All Knowledge comes from Experience. " - Albert Einstein

1982 - 2024
42
YEARS OF EXCELLENCE
FRASER ALLPORT

www.FraserAllport.com

Experience Matters

Fraser Allport specializes in Retirement, Income Tax, and Estate Planning, including Social Security, Medicare, and Long Term Care.

Fraser has been in Business for 5 Decades.

Experience Matters.

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 42 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, including Income Tax and Estate Planning, Social Security, Medicare, and Long Term Care. A holistic perspective is necessary to secure Your Life’s work and Legacy.

My methodology is a comprehensive approach to integrating all aspects of your Financial Life into one enduring “ Life Plan ”. The concept of complete “ Total Money Planning ” can help you attain financial as well as psychological 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 benefits of having financial Peace of Mind in Retirement are comforting, and priceless. It’s all about Wellness in every aspect 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, Long Term 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 Complimentary Consultation to learn my proprietary System, and how it can benefit you. Your private and Complimentary Consultation is about your Questions, Needs, Problems, Risks, Goals, and Your Legacy. Anything that you want to talk about. After listening to your situation, I then customize my 5 Step System to craft your “ Life Plan. ”

“ Get Smart about Your Money … and You’ll have more of it. ”

“ All Knowledge comes from Experience. ” – Albert Einstein

FRASER'S SERVICES

A seasoned Fiduciary with a diverse set of skills.

- 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 Allport

A Fiduciary and Certified Estate Planner ™

Owner of : The Total Advisor, LLC

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

Serving Clients Since 1982.
42 Years of Excellence.

Schedule your no obligation Complimentary Consultation with Fraser Allport at :

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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

Florida dbpr

Fraser Allport is a Continuing Education Provider

NICEP

Ask Fraser about his Estate Planning Services

Proud Member of the National Wellness Institute

Proud Supporter of

Florida Sheriffs Youth Ranches

Florida Sheriffs Association

Proud Supporter

iHeartRADIO

Former Radio Host

NSSA National Social Security Advisor Certificate

Medicare USA

COFE Council of Financial Educators

Google Reviews

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

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