FREE " TOTAL MONEY " PLANNING WORKSHOP

5 easy steps to Total Financial Wellness

1982 – 2025
43
YEARS OF EXCELLENCE
FRASER ALLPORT
Experience Matters

Integrating Retirement, Social Security, Medicare, Long Term Care, Income Tax and Estate Planning into a Total " Life and Legacy Plan " for those already in Retirement, and those planning to Retire.

As a Certified Estate Planner ™, Fraser Allport can help you Get Your House in Order with a free " Total Money Planning " Workshop onsite at your Location, or one-on-one in your Home.

Schedule Your no obligation Complimentary Consultation with Fraser at

www.FraserAllport.com

Do you know ***for sure*** if Your House is in Order?

- **Do You have a Will or a Trust ?**
- **Who knows where it's located ?**
- **What is the difference between a Will and a Trust ?**
- **Do you have a Power of Attorney and a Living Will ?**
- **Have you named an Executor or Successor Trustee ?**
- **Do your documents conform to current Florida Law ?**
- **What State is your legal residence for Estate purposes ?**
- **Do you have HIPAA Forms and a Health Care Directive ?**
- **Are all your Documents and Beneficiary Forms current ?**
- **If you are a Snowbird, do your documents conform to the Laws of *both* States ?**
- **If you are in a Second Marriage, or a Blended Family, you have even more issues.**
- **Do You have a Plan already in place to provide Home Health Care ? Fraser offers Home Health Care and Long Term Care Plans.**

Are you managing, or ignoring, your affairs ?

In short ... Are You Leaving a Legacy, or Leaving a Mess ?

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www.calendly.com/fiduciaryadvisor

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" All Knowledge comes from Experience. " – Albert Einstein

This Free Workshop will help you with the following issues:

- **This Free Workshop will help you Get Your House in Order. Decide right now to update your Estate Planning documents. This first step brings you and your entire Family a sense of security and certainty. This Workshop helps with your financial Peace of Mind and final Legacy.**
- **This Free Workshop clarifies the *differences* between a Will and a Trust.**
- **This Free Workshop will examine how to maximize Social Security for you, your Spouse, or your Survivor. This is for both Retirees and Pre-Retirees alike. Learn how to truly maximize your Social Security check.**
- **This Free Workshop may help you to reduce unnecessary Income Taxes, Court Costs, Family Feuds, Will Contests, and Lawyers' fees. Have you ever heard a Happy Story about Probate ?**
- **This Free Workshop will also discuss ways to reduce your Income Taxes.**
- **This Free Workshop will show you how to control the distribution of your Assets, both during your Life, and even after your Death.**
- **This Free Workshop will explain Medicaid Trusts : Their benefits and their pitfalls.**
- **This Free Workshop is helpful for Blended Families, Divorced Singles, Widowed Singles, Second Marriages, and Special Needs Families.**
- **This Free Workshop will discuss both Financial and Medical Powers of Attorney to manage your affairs if you are incapacitated.**
- **This Free Workshop will examine if you are subject to Federal Estate Taxes, and how to minimize them.**
- **This Free Workshop could help you avoid Estate Planning mistakes, especially with transferring Assets while you are alive. Watch out for Gift Taxes !**
- **This Free Workshop will discuss your various choices for personal " Final Plans and Expenses." This is important for your Survivors.**
- **This Free Workshop will show you how to protect your Independent Lifestyle, in your own Home, with Home Health Care Service Plans. Don't be alone, or a burden, or forced into a Nursing Home.**
- **This Free Workshop will offer you a Complimentary Risk and Fee Analysis of your current Investments. It's too late in your Life to lose money. <u>How much Risk, and Loss Potential, do you really have in your Portfolio ?</u>**
- **This Free Workshop will teach you the critical importance of having an integrated " Life Plan " that comprehensively includes all of the above issues holistically.**

Learn more about Your Money with Fraser.

For 43 Years ... Fraser is The Advisor that You Keep.

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*According to The Department of Health and Human Services, **70% of Seniors will need some form of Home Health Care in their lifetime.***

Fact: nearly three out of four Seniors will eventually need Home Health Care services. Think of the probabilities and cost of both you and your Spouse needing Home Health Care, at the same time !

Fraser also does a second Workshop on Long Term Care & Home Health Care Plans. Buy protection now, while you are healthy and you still qualify.

Schedule one of Fraser's presentations :

1) " Total Money " Planning. A holistic " Life Plan "

2) " Estate Planning : Leaving A Legacy, or Leaving A Mess. "

3) " How to plan for Out of Pocket Medical Expenses in Retirement "

Call Fraser about doing a Complimentary Presentation onsite for your Business, Charity, Group, Club, HOA or Condo Association, Workplace or privately, one-on-one in your Home.

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Serving Clients since 1982

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To learn more about Fraser Allport's Experience, Credentials and Services, please visit:

www.fraserallport.com

www.fraserallport.com/cep

Ask Fraser about his Estate Planning Services

This Free " Total Money Planning " Workshop focuses on Getting Your House in Order by reviewing every aspect of your Financial Life. Take Care of Yourself, your Family, Business, Charity, and Your favorite Causes. Protect yourself now ... while you are still healthy and able. This is *proactive* Legacy Planning.

This Free Workshop will also address your Lifetime Health Care Needs, and how to fund them ? Medical bills are a big issue, and big dollars. When doing Retirement and Estate Planning ... Be sure to include a realistic cost for your Lifetime **Out of Pocket Medical Expenses**.

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How are you going to fund your future Out of Pocket Medical Costs ?

- **Invite Fraser to come speak at your Facility, HOA, Charity, or Club.**
- **Avoid Probate : An ounce of prevention is worth a pound of cure.**
- **Be Proactive and Wise. Knowledge is only Power if you act on it.**
- **Be Good to yourself, your Family, and your favorite Causes.**
- **Get Your House In Order ... While You are still Healthy.**
- **Fraser also enjoys visiting with Folks in their Homes.**
- **Do The Right Thing. Leave A Legacy. Not A Mess.**

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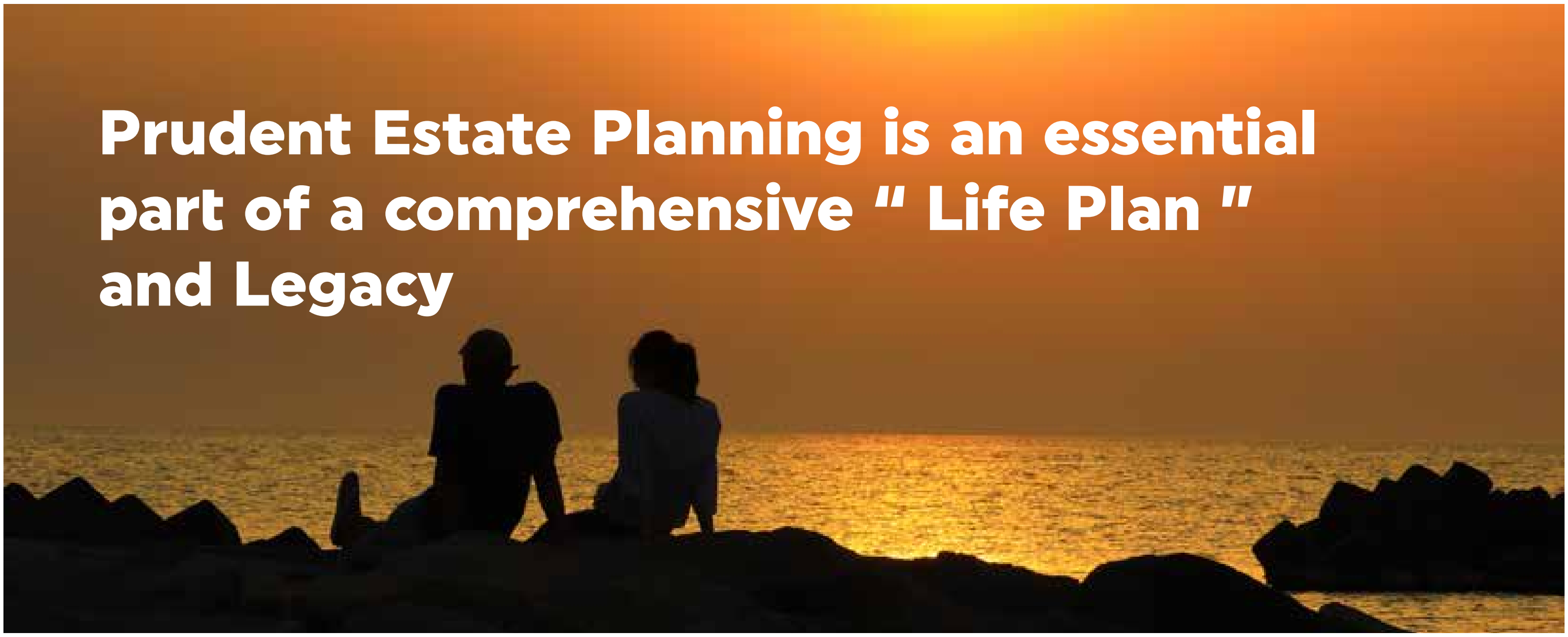

Prudent Estate Planning is an essential part of a comprehensive " Life Plan " and Legacy

Having a plan for what happens to all of your Assets after your Death is not what you think about daily. But Estate Planning is a necessity. Your Life's work is at stake. Take some time on this topic to plan Wisely. Make a promise to start today.

You have worked hard your whole Life for what you have. Do you really want Probate Court, Judges, Lawyers, and The State of Florida to make decisions about the management and inheritance of your Assets ? That can happen. But you can take control by being informed and proactive. Estate Planning is the ultimate in " an ounce of prevention is worth a pound of cure. "

Do you want to Leave A Legacy, or Leave A Mess ?

Sometimes, people think that Estate Planning is just for very wealthy people. Not so. Everyone eventually dies, and your Estate Plan helps ensure that your loved ones, dependents, and favorite causes are financially provided for upon your Death, or in the event of your incapacity. *Do The Right Thing - Plan Ahead.*

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