

# Fraser Allport - Fiduciary

**Owner of : The Total Advisor, LLC <sup>™</sup>  
Financial, Retirement, and Estate Planning**

**" Smart Money ... for Smart People "**

***Serving Clients Since 1982***

**Office 386 256 7300**

**Mobile 386 882 6256**

**[www.FRASERALLPORT.com](http://www.FRASERALLPORT.com)**

**For his Clients nationwide, Fraser Allport is " The Total Advisor ", specializing in Social Security, Medicare, Retirement Planning, Estate Planning, Income Tax Reduction, Asset Protection, and " Total Planning " for Individuals and Business Owners, including Debt Reduction.**

**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, Finance, 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 three decades.**

**Fraser is the Owner of The Total Advisor, LLC, a Financial, Retirement, and Estate Planning Firm in Daytona Beach, Florida. Fraser is also a Registered Investment Advisor, a Fiduciary for his Clients, a Certified Estate Planner <sup>™</sup>, and a Certified Corporate Wellness Specialist. <sup>®</sup>**

**Fraser advises Clients on how to Retire successfully, and plan for longevity. Fraser builds his Clients an integrated and holistic " Life Plan " that includes Retirement and Social Security Planning, Medicare and Health Care Planning, Income Tax Reduction, Estate Planning and Asset Protection.**

As an Investment Advisor and Fiduciary, Mr. Allport's Rule # 1 is simple :  
Protect your Principal, which will safeguard your standard of living and  
Peace of Mind.

***Protecting your Principal is Fraser's # 1 priority.  
" Be Safe and Smart with Your Money " is Fraser's motto.***

Fraser has volunteered as a Mentor at [www.weventure.com](http://www.weventure.com) ( formerly The Women's Business Center at the Florida Institute of Technology in Melbourne, FL. ) He has taught at The Corporate and Community Training Institute at Indian River State College – [www.irsc.edu](http://www.irsc.edu). Fraser is also a proud provider to both [www.Embry-Riddle.com](http://www.Embry-Riddle.com) and [www.Rollins.edu](http://www.Rollins.edu).

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

Fraser is a Certified Corporate Wellness Specialist<sup>®</sup>, educating Employees about their Finances. He has provided financial classes pro bono to Police Officers, Fire Fighters, EMS, and Our Military, across the country, in his Mission to " Save America's Middle Class. " He has also served as an Instructor at The Indian River Sheriff's Office for his " Financial Wellness in The Workplace " Course.

Fraser is trained to help Employers educate their Employees about all of their Money Matters, including Debt Reduction. Less " Money Stress " has been linked to happier and more loyal Employees, who are therefore more productive Employees too. Wise Employers offer Fraser's Financial Wellness Courses to Employees to raise their efficiency and morale.

Fraser supports The Florida Sheriffs Youth Ranches, and is proud to have served as an Ambassador for Florida's Guardian Ad Litem Program, which helps Children At Risk. Fraser has done extensive pro bono public speaking presentations to Charities, Churches, Schools and Non-Profits on how to increase Fundraising and Planned Giving.

As “ The Total Advisor <sup>™</sup> ”, Fraser provides comprehensive, integrated, and holistic “ Life Plans ” for his small Clientele.

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

**Below are just a few of the many topics that Fraser teaches :**

- Asset Protection : How to protect your Wealth in Lawsuit-Happy America ?
- Is your house in order ? Wills, Trusts, Powers of Attorney, and Living Wills.
- Income Tax Reduction : Stop needlessly overpaying your Income Taxes !
- Health Insurance, Medicare, Long Term Care, and Home Health Care.
- Protecting your Wealth 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.
- Estate Planning : Are You leaving a Legacy, or leaving a mess ?
- Licensed by Florida to teach Continuing Education to CPAs.
- How to maximize Social Security for you *and your spouse*.
- 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.

Since 1982, Fraser has served his Clients as an Independent Financial Professional. 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. Fraser lives in Daytona Beach, FL., and works with Clients all across the USA.

Fraser’s education, training, and experience in Financial Services, Economic History, and The Global Markets, have earned him the title of “ The Total Advisor <sup>™</sup> ”, who can take care of all your Financial Needs, both Personal and Business.

Fraser has built his Business and lasting Client relationships on the principles with which he was raised :

Be Honest and Work Hard.  
Always Keep Your Word.  
Finish What You Start.  
Treat People Right.

After 36 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, Fraser has the worldwide resources and contacts to find you the best Investments available, for the least cost.

Fraser has the skills, experience, and Global Network to help his Clients with any of their financial Needs and Goals, Personal or Business.

### **Fraser offers the following Services :**

- Fraser is a Certified Estate Planner <sup>™</sup> and a Certified Corporate Wellness Specialist <sup>®</sup>
- Social Security and Retirement Planning
- Health Insurance and Medicare choices
- Specialist in Florida's DROP Retirement Plan
- Complimentary Risk Analysis for your Portfolio
- Fee-Based Consulting and Discount Brokerage
- Comprehensive Planning for Business Owners
- Pro Bono Workshops on Estate Planning

- **IRA, Defined Benefit, 401k Retirement Plans**
- **Income Tax Reduction and Asset Protection**
- **Charitable Fundraising and Legacy Planning**
- **Financial Wellness Training for Employees**
- **Life Insurance, Annuity, Tax Free Income**
- **Investing for Safety and Lifetime Income**
- **Final Expense, Long Term Care, Home Health Care**

**Fraser has been Self-Employed for 36 Years, and can do business all 50 States.**

***Fraser Allport***  
**The Total Advisor™**

**For all your Financial needs**  
***“ Smart Money ... for Smart People. ”***

**Please see how Fraser can help you with your financial future at :**

**[www.FRASERALLPORT.COM](http://www.FRASERALLPORT.COM)**

***Call Fraser below for your Complimentary 15 minute Phone Consultation***

Office 386 256 7300

Mobile 386 882 6256

Email - [info@fraserallport.com](mailto:info@fraserallport.com)

Twitter [www.twitter.com/fraserallport](http://www.twitter.com/fraserallport)

Facebook [www.facebook.com/fraserallport](http://www.facebook.com/fraserallport)

Linkedin [www.linkedin.com/in/fraserallport](http://www.linkedin.com/in/fraserallport)

*I have been Self-Employed for 36 years*

*I will be here when you need me*

*Serving Clients Since 1982*

**2 Oceans West Boulevard  
Daytona Beach Shores, FL. 32118**

Legal Disclosure : The Total Advisor, LLC is an Independent Company owned by Fraser Allport. 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 the advisor's skill or ability. All investment strategies have the potential for profit or loss.