TOTAL FINANCIAL WELLNESS

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

After 39 years as an Independent Financial Advisor and Business Owner, I have created a 10 Step System for my Clients for " Total Financial Wellness " in every facet of their Money and Health, including Estate Planning 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 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.

My 10 Step " Life & Legacy Plan " is customized for you, based on your situation. Like the three legs of a stool as a sturdy foundation, I focus on three core areas of your Money : Financial Planning, Health Care Expenses, 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 of your Financial 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 10 Steps. So I offer you a Complimentary Consultation to learn my System, and how it could 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.

How can my 10 Step System help you ? Being Wise about Your Money means being proactive, because Smart People get Smart about their Money.

Fraser Allport - A Fiduciary and Certified Estate Planner ™
Owner of : The Total Advisor, LLC

A Retirement, Health Insurance, Tax and Estate Planning Firm
Serving Clients Since 1982

386.882.6256
www.fraserallport.com

Fraser offers the following Services

- Fraser Allport is a Certified Estate Planner ™ who can help you with Wills, Trusts, Powers of Attorney, and a Living Will
- Holistic Retirement Planning includes Social Security, Taxes, Medicare, Health Insurance, Investment and IRA Accounts
- Investing for Lifetime Income with a Health Care Rider
- Specialist in Florida Retirement System's DROP Plan
- Home Health Care Plans for staying in your home
- Fee-Based Consulting and Discount Brokerage
- Comprehensive Planning for Business Owners
- Complimentary Risk Analysis of your Portfolio
- Charitable Fundraising and Legacy Planning
- IRA, Defined Benefit, 401k Retirement Plans
- Final Expense and Critical Illness Protection
- Income Tax Reduction and Asset Protection
- Life Insurance, Annuity, Tax Free Income
- Fraser can work in all 50 States

Fraser Allport
is ... The Total Advisor ™

For all your Financial needs

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

www.FRASERALLPORT.COM **386.882.6256**

FRASER ALLPORT

The Total Advisor ™

For All Your Financial Needs

1982 – 2021
39
YEARS OF EXCELLENCE
FRASER ALLPORT

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Serving Clients since 1982

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Fraser has been Self-Employed for 39 Years, and can do business in all 50 States.

Read about my Biography, Experience, Credentials, and Services.
See how Fraser can help you with your financial future at
www.FRASERALLPORT.COM

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Please call Fraser for your Complimentary Consultation at : 386.882.6256

Complimentary Consultation

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FRASER ALLPORT

Owner of The Total Advisor, LLC ™

An Independent Retirement,
Health Insurance, Tax and Estate
Planning Firm

" Smart Money, for Smart People. "

For his Clients nationwide, Fraser Allport is " The Total Advisor ", specializing in Retirement and Estate Planning, plus Social Security, Medicare, and Health Insurance choices. Fraser also specializes in Income Tax Reduction and Asset Protection.

Fraser's holistic and comprehensive approach is " Total Money Planning " for Individuals and Business Owners. Like a puzzle, all your financial pieces get integrated. Fraser synergizes and harmonizes your Finances.

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 three decades.

Fraser is the Owner of The Total Advisor, LLC, an Independent Retirement, Health Insurance, 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**

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