

# FREE " TOTAL MONEY " PLANNING WORKSHOP

## 5 easy steps to Total Financial Wellness



Experience Matters

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

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

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](http://www.fraserallport.com)

- 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 so that you can remain independent in your own home ? Be Free, in your own Home, living Your Life, your way.

These are all Big Questions, and Big Issues for You.

*Are you managing, or ignoring, your affairs?*

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

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<https://calendly.com/fiduciaryadvisor>

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Office: **386.256.7300** | Mobile: **386.882.6256**

*" 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 or eliminate unnecessary 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 Analysis of your current Investments. It's too late in your Life to lose money. How much Risk, and Loss Potential, do you really have in your Portfolio ?
- 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.**

**Smart People get Smart about their Money.**

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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 " Home Health Care Plans ". Buy protection now, while you are healthy and you still qualify.

**Call Fraser at 386.882.6256**

to schedule any or all of his 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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# FRASER ALLPORT

## The Total Advisor™

For All Your Financial Needs



Experience Matters

A Fiduciary and Certified Estate Planner™  
Serving Clients since 1982

Proud Member



Proud Supporter of



PROUD MEMBER OF



To learn more about Fraser Allport's experience, credentials and services, please visit:

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

[www.fraserallport.com/cep](http://www.fraserallport.com/cep)



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**.

### 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.
- 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.
- An ounce of prevention is worth a pound of cure.
- 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 proactive and informed.

## 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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***" Smart Money, for Smart People. "***

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