TOTAL FINANCIAL WELLNESS

As a Fiduciary, my first responsibility to my 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 40 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 Care, 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 and 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 ***psychological*** benefits of having financial Peace of Mind in Retirement are comforting and priceless. It's all about Wellness in every facet 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, Health 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 no obligation Complimentary Consultation to learn my System, and how it can 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 5 Step System help you ? Being Wise about Your Money means being proactive, because Smart People get Smart about their Money.

" Get Smart about Your Money and You'll have more of it. "

Schedule Your no obligation Complimentary Consultation with Fraser :
https://calendly.com/fiduciaryadvisor

FRASER ALLPORT - The Total Advisor ™

A Fiduciary and Certified Estate Planner ™
Owner of The Total Advisor ™, LLC
A turnkey Retirement, Social Security, Medicare, Income Tax
and Estate Planning Firm

www.fraserallport.com | info@fraserallport.com
Office: **386.256.7300** | Mobile: **386.882.6256**

Serving Clients Since 1982

1982 – 2022 40 YEARS OF EXCELLENCE FRASER ALLPORT

Experience Matters

FRASER ALLPORT

The Total Advisor ™

For All Your Financial Needs

1982 – 2022 40 YEARS OF EXCELLENCE FRASER ALLPORT

Experience Matters

A Fiduciary and Certified Estate Planner ™
Serving Clients since 1982

After 40 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. My methodology is a comprehensive approach to integrating all aspects of your Financial Life into one holistic “ Life Plan ”. The achievement of “ Total Money Planning ” in all aspects of your money 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 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, Health 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 complete “ Life and Legacy Plan ” coordinates and then synergizes all of your Financial, Health Care, 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.

Fraser has been Self-Employed for 40 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

Schedule Your no obligation Complimentary Consultation with Fraser :
https://calendly.com/fiduciaryadvisor

FRASER ALLPORT - The Total Advisor ™
A Fiduciary and Certified Estate Planner ™
Owner of The Total Advisor ™, LLC
A turnkey Retirement, Social Security, Medicare, Income Tax and Estate Planning Firm

www.fraserallport.com | info@fraserallport.com
Office: **386.256.7300** | Mobile: **386.882.6256**

Fraser offers the following Services

- Medicare
- Annuities
- Tax Free Income
- College Planning
- Retirement Planning
- Income Tax Planning
- 403(b) and 401(k) Plans
- Investing in Mega-Trends
- Tele Health Medical Plans
- Medicare Advantage Plans
- Medicare Supplement Plans
- FRS DROP Retirement Plans
- ROTH and ROTH Conversions
- Real Estate Investments Trusts
- Deferred Compensation Plans.
  457 Qualified and Non-Qualified
- Fraser is a Certified Estate Planner ™.
  Leave A Legacy, or Leave A Mess
- Long Term Care and Home Health Care
- Tax Deductible ERISA Retirement Plans
- Mutual Funds vs. Exchange Traded Funds
- Tax Free benefits of Cash Value Life Insurance
- Maximizing Social Security Claiming Strategies
- Wealth and Tax Strategies for Business Owners
- Financial Wellness in the Workplace for C Suite and Employees
- Licensed by Florida's DBPR to teach Continuing Education to CPAs

Schedule Your no obligation Complimentary Consultation with Fraser :
https://calendly.com/fiduciaryadvisor

FRASER ALLPORT - The Total Advisor ™

A Fiduciary and Certified Estate Planner ™
Owner of The Total Advisor ™, LLC
A turnkey Retirement, Social Security, Medicare, Income Tax
and Estate Planning Firm

www.fraserallport.com | info@fraserallport.com
Office: **386.256.7300** | Mobile: **386.882.6256**

Serving Clients Since 1982

" All Knowledge comes from Experience. " – Albert Einstein

FRASER ALLPORT - Fiduciary
Owner of The Total Advisor, LLC ™

1982 – 2022 40 YEARS OF EXCELLENCE FRASER ALLPORT

Experience Matters

A turnkey Retirement, Social Security, Medicare,
Income Tax and Estate Planning Firm

" Smart Money, for Smart People. "

For his Clients, Fraser Allport is " The Total Advisor ", specializing in Retirement and Estate Planning, plus Social Security and Medicare. Fraser does Health Insurance for under age 65. Fraser specializes in Income Tax Planning, 457, 401(k) and 403(b) Plans.

Fraser's holistic and comprehensive approach is bona fide " 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 five decades.

Fraser is the Owner of The Total Advisor, LLC, an Independent Retirement, Social Security, Medicare, Income 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**

Schedule Your Complimentary Consultation with Fraser :
https://calendly.com/fiduciaryadvisor

FRASER ALLPORT - The Total Advisor ™

A Fiduciary and Certified Estate Planner ™
Owner of The Total Advisor ™, LLC
A turnkey Retirement, Social Security, Medicare, Income Tax and Estate Planning Firm

www.fraserallport.com | info@fraserallport.com
Office: **386.256.7300** | Mobile: **386.882.6256**
2 Oceans West Blvd., Daytona Beach Shores, Florida 32118

" Smart Money, for Smart People. "

" All Knowledge comes from Experience. " - Albert Einstein