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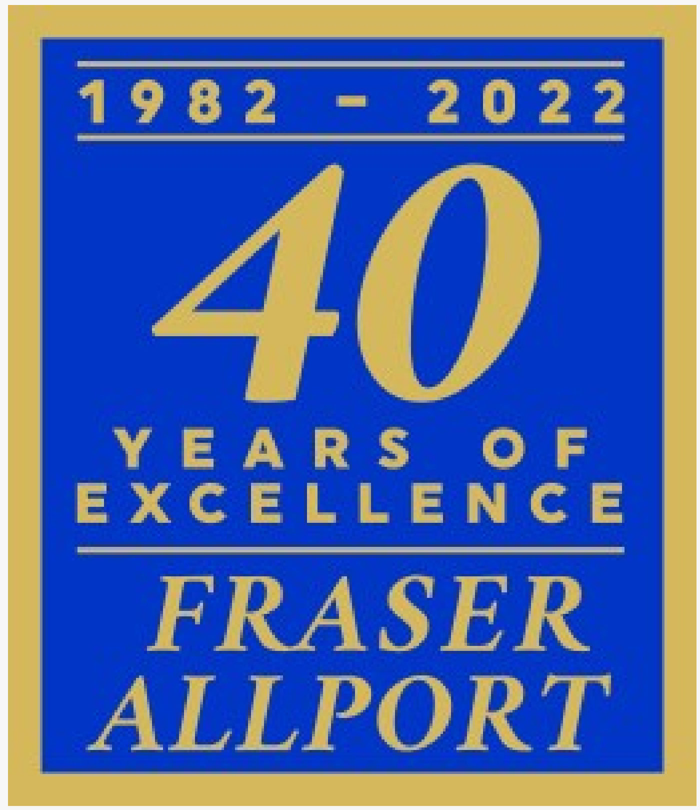

Experience Matters.

DAYTONA BEACH SHORES, FL, UNITED STATES, September 5, 2022 /EINPresswire.com/ -- Fraser Allport, Fiduciary, introduces his new Educational Workshop titled: "Investing Wisdom - How to plan for a secure and comfortable Retirement".

People wonder why they cannot retire with the Lifestyle that they envisioned. Many times, it's simply because of a lack of planning.

People will get out of their Retirement exactly what they put into it. Like life itself, a person gets what they give.

After five Decades in Financial Services, Fraser Allport has learned this Golden Rule:

Start your Retirement Planning today. It is never too early to plan. Time is a person's best ally.

But people don't know where to start. The answer is to start by seeking Professional advice, and simply asking questions.

> "All Knowledge comes from Experience. "
>
> *Albert Einstein*

To help people get going on the path to a secure and comfortable Retirement, Fraser has designed a simple Educational Workshop to help a person understand the basics of Saving and Investing. Fraser's Workshop is titled "Investing Wisdom", and it's a roadmap for the basic Do's and Don't of Investing 101, at any age.

Here is a brief outline of Fraser's Workshop, incorporating his 40 Years of Experience

"Investing Wisdom - 10 Rules for how to build a secure and comfortable Retirement " :


40 Years of Experience

1) The starting point for a person is to seek professional advice. It is not wise to go it alone. Money Matters are not DIY. The Goal is " Total Financial Wellness " in all aspects of a person's Life. That well-roundedness starts with Knowledge and assistance from a Teacher and Mentor like Fraser.

2) For any successful Project in Life ... Start early. The sooner that a person starts, the better the outcome. That's just common sense Wisdom.

3) To use a metaphor, it behooves a person to be the Quarterback of their Financial Team. That means getting proactive, involved, educated, and money savvy.

The key is to participate and delegate, but never abdicate. Think of it as simply getting in one's own huddle. If a person gets smart with their Money ... they will have more of it.

4) Fraser says in his Workshops that if a person was smart enough to make their own money ... then they are also smart enough to manage it. What a person simply needs is a patient and understanding Teacher and Mentor. That's Fraser's role.

5) Everyone knows that the hardest part of anything in Life is just starting. Fraser encourages a person to just start where they stand. Fraser's role is to help as Teacher, Mentor, Coach, and Educator. Scheduling an appointment with a Financial Professional is the first step to success.

6) It behooves a person to seek out an Independent Fiduciary with decades of experience in providing comprehensive Services, so as to build a holistic Plan for the Investor. Fiduciaries are held to high ethical and legal standards.

Investing Wisdom is to find a Fiduciary Educator who specializes in Retirement Planning and understands how to integrate Social Security, Medicare, Income Taxes, and Estate Planning.

7) Estate Planning is an integral part of every Retirement Plan. A person is wise to understand Wills versus Trusts, Powers of Attorney, Health Care Directives, a Living Will, and Final Expense planning. As Fraser teaches ... The Goal is to " Leave A Legacy, not A Mess. "

8) A common myth is that a person needs a lot of Money to start investing. Not so. A person can

start investing with as little as $ 50 monthly. There are many quality investments that will allow a person to make small monthly contributions to get started. Starting early with small amounts is how acorns grow to become oak trees.

9) A person is wise to pay attention to the investment's risk, fees, and performance. An Investor's best friend is to ask questions until comfortable and knowledgeable. A quality Teacher and Mentor is one who will take the time and patience to help the person become a wise Investor. Finding an Advisor, getting started, and asking questions is how a person becomes a wise Investor.

10) Investing is much like Life itself: If a person makes the effort and puts in the time ... Results will happen and flourish. Like anything worthwhile in Life, it takes time and patience to become money savvy. But it's worth the effort because that's how a person will achieve their financial Goals: Get started, ask questions, put in the time, and be patient. The old adage is true: Acorns become oak trees. Every person can be that acorn who becomes an oak tree.

A person's financial Goals may not just be Retirement Planning. That person may instead be planning for college or a wedding, buying a home, starting a business, doing home improvements, etc. Whatever the financial Goal ... Fraser's emphasis is for a person to start now. Time is an Investor's best friend and greatest ally. If a person gets smart with their money ... they will have more of it.

For those who wish to plan for their Financial Goals and Retirement by becoming a wise Investor ... Schedule complimentary time with Fraser at www.calendly.com/fiduciaryadvisor, or call Fraser Allport at 386.882.6256.

Fraser Allport is an Independent Fiduciary and Certified Estate Planner ™ with 40 Years of Experience.

Fraser has been in Business for five Decades.

Experience Matters.

See Fraser Services and Seminars at:

https://www.fraserallport.com/my-services

https://www.fraserallport.com/my-seminars

Fraser's blog is at: www.fraserallport.com/blog

Watch Fraser's Educational YouTube Videos at:
https://www.youtube.com/channel/UCJIvncPq8Up5ptDiEUT3bJA/videos

Fraser's approach is very simple : He gives his Clients Facts, Choices, and The Law in building comprehensive and holistic Financial Plans.

Fraser Allport provides the experience that comes from 40 Years of Relationships, Reliability, Resources, and Results.

Experience Matters

Fraser’s CV’, Workshops, and Educational Library of articles are at : www.fraserallport.com

Schedule a no obligation Complimentary Consultation with Fraser at https://calendly.com/fiduciaryadvisor, or call Fraser at 386.882.6256.

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