Fraser Allport, Fiduciary and National Social Security Advisor ® offers Complimentary Social Security Planner

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Serving Clients since 1982

DAYTONA BEACH SHORES, FL, UNITED STATES, June 8, 2023 /EINPresswire.com/ -- Fraser Allport is a Fiduciary, Certified Estate Planner ™, and a National Social Security Advisor ®.

Fraser offers a COMPLIMENTARY SOCIAL SECURITY BENEFITS PLANNER.

Fraser has been serving his Clients since 1982.

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

That's 41 Years of Experience.

And Experience Matters.

Fraser can help a person with Retirement, Social Security, Income Tax and Estate Planning

A person may need to pay Income Taxes on a portion of their Social Security benefits, based on their Income.

But knowing the Rules can help a person minimize their Income Taxes as much as The Law allows.

Don’t needlessly over-pay Income Taxes !
Find out the right amount, and pay that.

Whether or not a person's Social Security benefits are taxable depends on their " Provisional Income."

Provisional Income is calculated by taking Adjusted Gross Income (AGI), not counting Social Security benefits, and adding in nontaxable interest (e.g. : Tax Free Bond income), and half (50%) of one's Social Security benefits.

Depending on one's " Provisional Income ", Social Security Benefits are then taxed at either 50% or 85%.

Social Security and Income Taxes can get complicated, so don't go it alone.

Retirement Rule #1 : Seek out Professional help.

Fraser Allport - 41 Years of Excellence.

It's the IRS and Income Taxes, so you don't want to make any mistakes. Don't tug on Superman's cape with the IRS.

Important : Social Security decisions are irrevocable after 12 months. So " Do It Yourself " is a really bad idea for Your Retirement Planning.

Fraser Allport offers a Complimentary Social Security Consultation so that a person can understanding their various Claiming Strategies.

When is the best time to file, and how does a person maximize their Social Security Benefits ?

Fraser can help understand and optimize Social Security benefits for a person.

Schedule a Complimentary Consultation with Fraser Allport for your COMPLIMENTARY SOCIAL SECURITY BENEFITS PLANNER at :
www.calendly.com/fiduciaryadvisor, or just call him at 386.882.6256.

The hardest part of any task in Life is simply starting it.

And the hardest part of starting a Retirement Plan is to simply call a Financial Professional.

Just Getting Started with a Retirement Planning relieves a person's apprehension and tension about the process.

Starting always makes a person feel better : They are on their way !

Procrastination is the # 1 problem when it comes to building a successful Retirement Plan.

Retirement does not just happen by accident, or by itself. It is not a given that one can retire.

Planning is a verb. Retirement Planning requires Action.

A person need not work until their Death if they start their Retirement Planning early.

Time is Money, and Time does not come back. Start your Retirement Plan today.

Fraser Allport also helps people understand which Social Security benefits they are eligible to receive: their own Benefit, a Survivor Benefit, or Spousal, or Divorced ? Fraser helps them understand the rules that apply to them, and when to choose the specific strategies that maximize their specific situation.

All Knowledge comes from Experience.

And Experience Matters. That's Fraser.
Fraser is The Advisor that a person keeps for Life.

Fraser is the way that it used to be.
Fraser is the way that it's supposed to be.

See Fraser's Bio', Services, and Educational Workshops, and Schedule a Complimentary Social Security Consultation with Fraser at: www.fraserallport.com

Talk with some of Fraser's Clients. References are available upon request.

Fraser also helps with any other financial questions on a person's mind as well, including Medicare, Income Taxes Portfolio Optimization and Estate Planning. How does one safely and wisely invest their " Nest Egg " upon Retirement?

Fraser practices holistic, integrated Retirement Planning for Teachers. Like a balanced diet ... Fraser builds balanced Retirement Plans.

Think of one's financial Life as a puzzle: All the pieces of a person's Retirement Plan need to fit together into a comprehensive whole.

Fraser builds integrated and holistic Financial Plans for his Clients, like building a balanced Nutritional Plan. It's all about synergy and Balance.

Fraser is a Fiduciary and Certified Estate Planner with 41 Years of Experience.

Fraser can help a person with Retirement and Estate Planning, Income Taxes, Social Security and Medicare.

Medicare can be confusing, and Out-of-Pocket expenses not covered by Medicare pose a financial risk to Retirees.

Home Health Care is another expenses not fully covered by Medicare. Home Health Care expenses are 24/7/365.

Fraser is licensed in Medicare and Medicare Supplements.
Fraser is a Trusted Authority for your Medicare questions .

Being able to stay in your home with Home Health Care coverage has become a big priority for Retirees.

Fraser has solutions for those who desire protection for Home Health Care expenses.

To afford the large and inevitable expenses that a person will spend on medical care in retirement as they age, they should budget accordingly in their Financial Plan. It's logical and an imperative : Don't forget to factor in Out-of-Pocket Health Care costs when calculating Financial Planning in Retirement.

Fraser Allport, a Fiduciary and Certified Estate Planner, is licensed to assist a person with Medicare, Medicare Advantage Plans, Part D Drug Plans, Home Health Care and Long-Term Care Plans, and Medicare Supplement Plans.

Please see Fraser's Library of Medicare articles at https://www.fraserallport.com/medicare-library/

Fraser also specializes in the Florida Retirement System's DROP Program.
Please see Fraser's DROP and Medicare Library at: https://www.fraserallport.com/florida-drop-library/

Fraser can help a person learn more about the various aspects of Florida's DROP, 403(b), and 457 Deferred Compensation Plan.

Fraser works across all of Florida, and can also work in all 50 States.

As Fraser says ...

If a person gets smart with their Money ...
They will have more of it.

See Fraser's Educational Workshops at https://www.fraserallport.com/my-workshops/

The finishing touch to every good Financial Plan is Estate Planning.

A licensed Fiduciary is legally and ethically obligated to act in a person's Best Interest, and can help navigate the ins and outs of Estate Taxes, Life Insurance, Wills and Trusts, and more. Since 1982, that's what Fraser has been doing for 41 Years. Experience Matters.

Fraser Allport is a Certified Estate Planner ™ , and can help craft a lasting Estate Plan.
When a person dies ... They want to Leave A Legacy, not A Mess.

An Estate Plan is about properly and easily passing one's entire Life's work and Assets.
See Fraser's Estate Planning Credentials and Services at : https://nicep.org/profile/fraser-allport-id-908

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Experience Matters.

Fraser is the way that is used to be. Fraser is the way that it's supposed to be.
With 41 Years of Experience ... Fraser is The Advisor that a person keeps for Life.

Fraser's website also has a link to Google Reviews from his Clients.
Read what Fraser's Clients say about their experience with him.

Read Fraser's Client Google Reviews at :
https://www.google.com/search?client=firefox-b-1-d&q=Fraser+Allport#lrd=0x88de6054f6da76b7:0xe1bfd223d960bf29,1,,,%60

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