Fraser Allport, Fiduciary, presents: Total Financial Wellness Workshop

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Serving Clients since 1982

DAYTONA BEACH SHORES, FL, UNITED STATES, June 18, 2023 /EINPresswire.com/ -- Fraser Allport, Fiduciary, presents his : Total Financial Wellness Workshop.

Fraser Allport is a Fiduciary with 41 Years of Experience serving all of Florida.

Fraser specializes in Retirement Planning, Social Security, Medicare, Income Taxes, and Estate Planning.

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

Fraser Allport is also a Certified Estate Planner ™

A Fiduciary's first responsibility is to protect a Client's Principal, and then generate steady Income from it.

“ Don’t Lose a person's Nest Egg ” is Job # 1 for a Fiduciary.

Retirement is too late in one's Life to lose Money !

After 41 years as an Independent Financial Advisor and Business Owner, Fraser Allport has created a 5 Step System for his Clients for “ Total Financial Wellness ” in every facet of a person's Money and Health Care, including Medicare, Income Tax, Social Security, and Estate Planning.

As a Fiduciary, Fraser's responsibility is to secure a person's Life’s work and Legacy.

Fraser's methodology is a comprehensive approach to integrating all aspects of a person's Financial Life into one holistic “ Life Plan ”.

The concept of complete " Total Money Planning " can help a person attain financial as well as psychological security and Wellness in Retirement.

The Goal is for a person to have true financial " Peace of Mind " in Retirement, where they don't worry about their Money.

They spend and enjoy it, knowing that their Money and their 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 a person's Life.

Fraser Allport - 41 Years of Excellence.

Fraser's 5 Step " Life & Legacy Plan " is customized for each individual, based on their situation.

Like the four legs of a table as a sturdy foundation, Fraser focuses on four core areas of a person's Money :

Retirement Planning
Health Care Expenses
Income Tax
Estate Planning.

Taking good care of his Client's Money, their Health Care expenses, and their Legacy is what Fraser does as his Clients' financial shepherd.

In sum, Fraser's " Life and Legacy Plan " coordinates and then synergizes all of a person's Financial, Tax and Estate Planning issues, like spokes in a wheel.

So that a person can enjoy their Money, their Health, their Independence and their Legacy, and not worry about them, or worse ... lose them.

To utilize Fraser's 5 Step process to " Total Money Planning and Financial Wellness ", a person can schedule a Complimentary Consultation at :

www.calendly.com/fiduciaryadvisor.

The Complimentary Consultation is about each person's Agenda : Questions, Needs, Problems, Risks, Goals, and their Legacy.

Anything that a person wants to talk about.

After listening to their situation, Fraser then customizes his System based on each individual's Needs and Goals.

As Fraser says ... " If a person Gets Smart about their Money ... They will have more of it. "

Fraser specializes in Retirement Planning, Social Security, Medicare, and Income Taxes.

Fraser is also qualified in tax-deductible ERISA Plans :
IRA, 401(k), 403(b), Defined Benefit and 457 Deferred Compensation Plans.

Fraser can help a person with IRA accounts : Traditional IRA, ROTH IRA, and ROTH Conversions.

Mr. Allport emphasizes holistic planning, integrating all aspects of a person's finances into his " Total Money Planning " system.

Fraser Allport's CV, Services, and Seminars are at www.fraserallport.com

Work with an Independent Fiduciary.
Don't settle for less.

Schedule a no obligation Complimentary Consultation with Fraser Allport using his easy online calendar at www.calendly.com/fiduciaryadvisor

To help people Get Smart with their Money, Fraser Allport offers an extensive Library of Educational Videos on his You Tube Channel.

Please see Fraser's YouTube Channel at :
https://www.youtube.com/channel/UCJIvncPq8Up5ptDiEUT3bJA/videos

Fraser Allport also specializes in the Florida Retirement System's DROP Program.

Fraser also helps those who are retiring from Florida's Deferred Retirement Option Program and 457 Plans.

For those who participate in the Florida Retirement System's DROP Program and 457 Deferred Compensation Plans, watch Fraser's Educational Videos at https://www.fraserallport.com/florida-drop-library/.

Preparing for Health Insurance and Out of Pocket Medical Expenses as you age is an important part of Retirement Planning, which is why Fraser Allport is licensed in Medicare, Medicare Advantage, and Medicare Supplements. Watch Fraser's Medicare Videos at https://www.fraserallport.com/medicare-library/.

Social Security is also an integral part of Retirement Planning. Fraser Allport offers a no obligation Complimentary Consultation to help people analyze their optimum Social Security claiming strategies at https://www.fraserallport.com/social-security/.

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

Fraser Allport is a Certified Estate Planner ™ , and can help craft a lasting Estate Plan.

When a person passes ... They want to Leave A Legacy, not A Mess.

Visit Fraser Allport's Estate Planning website at :
https://nicep.org/profile/fraser-allport-id-908

Learn about Fraser's 5 Step "Total Money Planning System " at
https://www.fraserallport.com/my-seminars/

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

Fraser offers Phone, Zoom or In-Person consults.

Fraser also does Onsite Educational Workshops at a School, Facility, HOA, Senior Center or Club.

If a person Gets Smart with their Money ... They will have more of it.

Fraser serves all of Florida, and can work in all 50 States.

Fraser has been in Business for 41 Years.
Experience Matters.

References available upon request.

“ All Knowledge comes from Experience. ” - Albert Einstein

The Total Advisor, LLC is an Independent Retirement, Social Security, Medicare, Income Tax and Estate Planning Firm owned by Fraser Allport. Investment Advisory Services are offered through Coppell Advisory Solutions, LLC, dba Fusion Capital Management, an SEC Registered Investment Advisor, transacting business in States where it is registered or excluded from registration. FL. License # A004461 and L 09 47 754. SEC registration does not constitute an endorsement by the SEC, and does not speak to Advisor’s skill or ability. All investment strategies have the potential for profit or loss.

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