Fraser Allport, Fiduciary : Public Speaker : Educational Financial Workshops

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Serving Clients since 1982

DAYTONA BEACH SHORES, FL, UNITED STATES, June 24, 2023 /EINPresswire.com/ -- Fraser Allport is a Fiduciary with 41 Years of Experience.

And Experience Matters.

Fraser Allport, serving all of Florida, specializes in Retirement Planning, Social Security, Medicare, Income Tax and Estate Planning.

Fraser is Self-Employed.

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

He only works for himself and his Clients. Not some Big Company or Big Bank.

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

Fraser also offers one-on-one Phone, Zoom or In-Person private Consultations.

Schedule an Educational Workshop or private Complimentary Consultation with Fraser at www.calendly.com/fiduciaryadvisor, or simply call Fraser at 386.882.6256.

Fraser's Educational Workshops topics are :

- Medicare

- Annuities

- Tax Free Income
- Longevity 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
- ROTH and ROTH Conversions
- Real Estate Investments Trusts
- 457 Deferred Compensation Plans.
- Fraser is a Certified Estate Planner ™.
- FERS and FRS DROP Retirement Plans
- Long Term Care and Home Health Care
- Tax Deductible ERISA Retirement Plans
- Mutual Funds vs. Exchange Traded Funds
- Fraser is a National Social Security Advisor ®
- Tax Free benefits of Cash Value Life Insurance
- Maximizing Social Security Claiming Strategies
- Licensed by Florida’s DBPR to teach CE to CPAs
- Federal Employee Retirement System Specialist

Fraser Allport - 41 Years of Excellence.

- Women and Men have different Retirement Needs
- Financial Wellness Workshops for C Suite and Employees

A person's Retirement will be better if they plan for it early, and seek professional advice.

See Fraser Allport's comprehensive Suite of Services at www.fraserallport.com.

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

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

Upon passing ... Leave A Legacy, not A Mess.

See Fraser's Estate Planning Services at :

https://nicep.org/profile/fraser-allport-id-908

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'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 diligent 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 ", see :

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

Social Security and Retirement Planning are integrated, and need to be part of a Holistic " Life Plan. ".

Fraser Allport, Fiduciary, is a National Social Security Advisor ®

https://www.fraserallport.com/social-security/

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

" If a person gets smart with their Money, they will have more of it. " says Fraser.

After 41 Years in Business .. Fraser is a Trusted Authority.
Fraser is The Advisor that a person keeps for Life.

Work with an Independent Fiduciary like Fraser Allport.
Don’t settle for less.

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 here :

https://www.youtube.com/channel/UCJIvncPq8Up5ptDiEUT3bJA/videos

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

For those who participate in the Florida Retirement System's DROP Plan and Deferred Compensation Plans, see :

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.

See Fraser's Medicare Library at https://www.fraserallport.com/medicare-library/.

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

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.

" All Knowledge comes from Experience. " - Albert Einstein

The Total Advisor, LLC is an Independent Retirement, Health Insurance, 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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