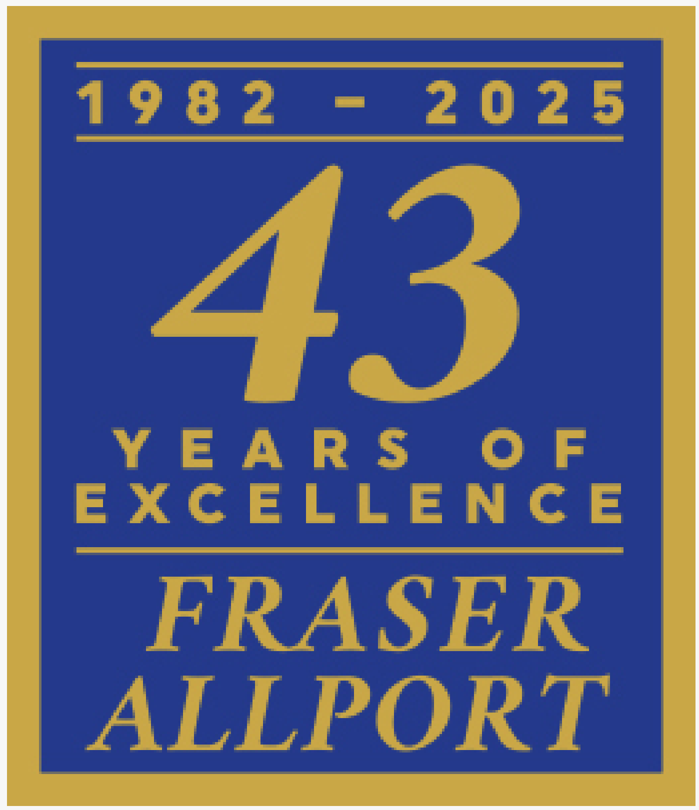
Fraser Allport achieves the prestigious Accredited Investment Fiduciary ® designation

The benefits of working with an Accredited Investment Fiduciary ®



Serving Clients since 1982

DAYTONA BEACH SHORES, FL, UNITED STATES, May 7, 2025 /EINPresswire.com/ --

Fraser Allport is proud to announce that he has achieved the prestigious Accredited Investment Fiduciary ® Designation.

AIF ® Designees are uniquely equipped to help the discerning Investor.

Accredited Investment Fiduciary ® (AIF ®) Designees stand apart. Certified specifically for their expertise in applying a Fiduciary process, AIF ® Designees bring a specialized level of care and accountability to their Client relationships.

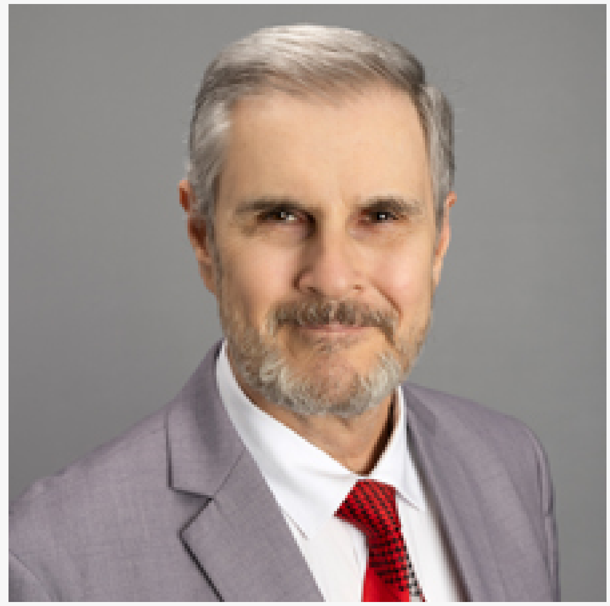
In Fiduciary language : Loyalty requires acting solely in the best interests of the Client, while care requires exercising due diligence and prudence in making decisions. Loyalty means avoiding conflicts of interest and acting without personal gain, while care involves thoroughness and good faith.

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

Here’s what distinguishes an AIF Designee from other Financial Professionals :

Experience:

AIF ® Designees must provide documented industry and educational experience to qualify for the designation.


Experience Matters

Education :

Designees complete specialized AIF ® Training focused on the Prudent Practices ® for managing Fiduciary assets across wealth management, nonprofit, and retirement plans.

Competence :

AIF ® Designees must pass a rigorous exam demonstrating their mastery of Fiduciary standards of conduct for acting in the Client's Best Interests.

Ethics :

Designees adhere to a strict code of ethics and conduct, reflecting a commitment to Professionalism and Excellence.

Continuing Education :

Designees are required to stay current by meeting annual continuing education requirements.

A good Fiduciary is a good Teacher, providing Comprehensive and Concierge-level Support for Clients.

That's Fraser Allport.

About Broadridge and Fi360 :

Fi360, Inc., a Broadridge Financial Solutions, Inc. subsidiary, is accredited by the ANSI National Accreditation Board for the AIF Designation, placing it among a select group of independently accredited credentials in financial services. Please visit : https://www.fi360.com/

Broadridge Financial Solutions (NYSE: BR) is a global fintech leader with $5 billion in revenues. Its technology and infrastructure underpin key aspects of investing, corporate governance, and communications - serving banks, broker-dealers, asset and wealth managers, public companies, and tens of millions of Investors worldwide. Broadridge's platforms support the daily trading of more than $9 trillion in securities globally. Please visit : www.broadridge.com

Author :

Fraser Allport is an Accredited Investment Fiduciary ® and a Certified Estate Planner ™.
He has been in Financial Services for 43 Years. Please visit : www.FraserAllport.com

Fraser Allport is the Owner of The Total Advisor, LLC, an Independent Retirement, Social Security, Medicare, Long-Term Care, Income Tax, and Estate Planning Firm in Daytona Beach, Florida. Fraser also specializes in 401k, 403b, and 457 Deferred Compensation Plans, ROTH and Traditional IRAs, and Florida's DROP.

Fraser can also help with the U.S. Government's FERS and TSP.

Fraser's holistic and integrated approach is " Total Money Planning " for Individuals and Business Owners.

Like a puzzle, all the financial pieces for a person need to be fully integrated and synergistic.

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. He has been a Self-Employed Business Owner since the day he graduated from Georgetown, serving Clients as an Independent Financial Professional for five decades now.

Fraser can also help with Medicare and Social Security questions.

As a Certified Estate Planner ™, Fraser can provide education and assistance, together with an Attorney, regarding Wills, Trusts, Powers of Attorney, a Living Will, Final Expenses, and Legacy Planning for loved ones and Charities.

Fraser's 43 years of experience give him the skills and resources to meet a Client's Goals and Financial Needs, both Personal and Business.

His responsibility is to shepherd and safeguard a person's Money with his veteran understanding of History, Economics, and Global Markets.

Plus, Fraser is an Independent. He only works for himself - and for his Clients.

Fraser advises people on how to retire comfortably, with security and peace of mind.

He builds his Clients a comprehensive "Life Plan" that integrates Retirement Planning, Social Security, and Medicare.

Fraser also specializes in Long-Term Care and Home Health Care, Income Taxes, Estate Planning, Longevity Planning, the FRS DROP, and the U.S. Government's FERS and

TSP.

As a Fiduciary,

Fraser’s # 1 Rule is simple: Protect a Client's Principal, which will help safeguard the Client's standard of living and Peace of Mind in retirement.

Contact Fraser Allport at : 386.882.6256 or visit www.FraserAllport.com for Fraser's Client Reviews.

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