

June 2011,

Michelle, my Guardian Angel

I was introduced to Michelle Tate-Loverly six years ago when my accountant and my lawyer despaired of ever getting my financial affairs into some semblance of order.

After a long drawn out battle with Cancer, during which his usual meticulous attention to business went out the window, my husband was well aware that he was leaving me with an almighty mess on my hands.

Michelle's challenge in sorting out my financial fiasco was a nightmare. Her staff was well chosen and well versed to offer all manner of help under her careful guidance. With utmost patience, she guided me through the administrative and financial morass to the point where I realised I was not destitute, but could in fact lead a comfortable life with the systems she set up for me.

This was achieved in under 18 months. Michelle became my project manager who kept everyone on track, not allowing legal or accountancy issues to create unnecessary and costly hold-ups. She gave unprecedented support far beyond the usual role of a financial advisor. She was there to hold my hand with all the selling, buying and distributing of shares and property according to the terms of the Will, the dictates of law and the personal needs of a client in the middle of mourning and without a clue about the various business affairs her husband had left.

Thanks to Michelle, I have cast off the burdens of financial complications which were a millstone around my neck. I now have a well balanced portfolio of property, shares and superannuation. I have achieved a comfortable life style which includes the ability to travel (very important with ten grandchildren and other family members sprinkled around a number of states), and to indulge in other favourite pastimes and entertainments.

Michelle continues to guide me in all my business transactions, is teaching me to budget and keeps me on the straight and narrow. All this, with a gracious, friendly and helpful manner which never once gives you the feeling that you've absolutely nuts (even if you are), but on the contrary, validates you and encourages you while giving the best possible professional advice.

Most importantly, while doing all this, she makes you feel that you count as a person, a rare quality in today's consumer age where often, individual worth is lost in the business transaction.

Without reservation, I can guarantee that Michelle Tate –Loverly is someone who will give you the best advice in matters financial, will go the extra mile in putting your affairs in order and guiding you through administrative and legal complexities and on top of that, become your friendly Guardian Angel.

Thank you Michelle for your outstanding support, your getting my financial life back on track, your personal touch and your friendship.

Teresa