

# Testimonials

**Here are some comments from our clients and partners:**

**► I am writing this letter to express my gratitude for all of your assistance during the past year and a half.**

In August 2018, I became increasingly overwhelmed with managing my personal finances and was more focused on being a single parent. I learned about Daily Money Managers and felt this would best suit my needs.

I continued my research until I found your company, Sensible Daily Money Managers. Both of you put my mind at ease and developed a plan with me to eliminate some debt while beginning to save for future expenses. Over time, you built a strong rapport with me and I started to work towards learning how to independently manage my finances.

I am grateful for your guidance and support during this time. I would highly recommend your company to anyone who expresses an interest. While I am still working to become even more financially stable, I know that I would never be in the position that I am in today had it not been for your financial expertise.

With Sincere Gratitude,

**S.P.O**

► I had the opportunity to observe Nora's work as she managed my parents' affairs during their most challenging times.

My father depended heavily on her for everything from dealing with the complexities of health insurance to handling his day-to-day payments and correspondence. My parents spent half of the year abroad and put their affairs in her hands while they were away. They also felt a bit insecure about their English language skills and depended on her to handle any formal communications in English. Her bi-lingual skills were a great help to them.

When my father passed away, we realized how uninformed my mother was about their financial affairs and the mechanics of managing the responsibilities of home ownership and her own health insurance. Nora was able to guide my mother through this difficult transition and take an increasingly vital role in managing her affairs as she dealt with her own protracted illness and ultimate passing.

I will always be grateful for the help and support she provided my parents during the most difficult stages of their lives.

Sincerely,

G.L.

► Five years ago, I realized that my adult daughter was having great difficulty managing her financial

**responsibilities. I turned to my accountant for advice, and he recommended that I call Sensible Daily Money Managers.**

Over these past five years Nora has been my daughter's North Star to financial management. Nora provided the kindness and great patience needed to guide my daughter to financial stability.

I've been pleased with the professionalism that Nora and Marlene have shown in their relationship with my daughter and me and I am glad to recommend them to others who would benefit from their expertise.

**J.H.**

**► We work in the senior market helping our clients with retirement planning and health insurance needs.**

We have referred several of our clients to Sensible Daily Money Managers. They provide a much-needed service to seniors in our area. They are a very kind, professional and organized company. In today's world, paperwork can be overwhelming for all of us.

We find, with your services, families enjoy spending time together not at the kitchen table drowning in papers.

Thank you, Nora and Marlene, we appreciate you both and will continue to refer our valued customers to you in the future.

**Bruce and Ellie Weiner**

**BEW Financial Solutions**

## ► **Retired Executives and Professionals**

I am writing to you from REAP of the JCC in Tenaflly to let you know that your lecture about daily money managers and making financial life easier was very interesting to all of us. We have learned a lot from the information you provided for us and we appreciate and thank you very much.

Our best wishes and thanks again.

Sincerely,

**Lina Sanders**

**Member of REAP**