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Steve Malan

Executive Financial Planner

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To Whom It May Concern:

My family, our business and I have used Steve Malan as our Financial Planner since 1991 – Steve has added value and support throughout our business relationship, however he is not just my family and my business broker he is also a friend.

My father who is a co-director of our family business says that "The proof of any product or service isn't when you buy it – it's when you have to use it ----- and in the case of risk cover it's when the claim arises that you find out"

I have unfortunately had to claim for one of the Dread Diseases within the past few months –

At times I felt like giving up – not because Old Mutual wouldn't pay out – but because the two doctors on the case (one who has been my doctor since my school days) refused to complete the relevant documentation – the doctor was to BUSY, the surgeon felt that I shouldn't be allowed to claim as I was not "terminally ill" – the operation had been a success as far as he was concerned.

Steve Malan wouldn't let me give up and although he had the same response he eventually succeeded in getting the necessary forms completed –

Old Mutual paid the insured amount into my account within 48 hours of receiving the last document.

I wonder how many people who have a legitimate claim have lost out because a doctor or some other official felt that it was immoral or irrelevant to claim, and they don't have a broker in their corner to support them?

Yours sincerely

Stefanie Schöpflin
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