

"Alone we can do so little; together we can do so much" - Helen Keller

Special points of interest:

- > Our travels
- > Our accomplishments
- > Our lives

LEVY VISION STATEMENT

To let every client know that we have their needs and best interest at heart.

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Returning to the Classics by Victor Levy

Last year, as my son, Lewis, was beginning his junior year of high school at Cherry Hill East, I decided to read all of his assigned English readings. This included stories that I had read previously such as *The Great Gatsby* and *Death of a Salesman*. But it was Steinbeck's novel, *Of Mice and Men*, which was most impactful and relatable to my work today in financial planning. Here are a few key takeaways:

Theme #1: Human Existence: *Of Mice and Men* teaches us a lesson about the nature of human existence as the characters desire more than anything to have the comfort of a friend.

My Take. The essence of the work we do at Levy Wealth Management Group in financial planning is rooted in friendship and altruism. We are here for you and care about you beyond the mundane details of financial projections.

Theme #2: Camaraderie: Many of the characters in Steinbeck's great novel come together in a way that would allow them to be like brothers to one another. They want to live in a way that places another's best interest ahead of their own, to protect each other and to know that there is someone in the world dedicated to protecting them.

My Take: In our work as financial advisors, we are fiduciaries. As such, we are required to place the interest of our clients ahead of our own personal self interest. We do this when we are proactive and help you with the fulfillment of your dreams and goals. Though in Steinbeck's novel this theme is idealized, in our work this is how we approach it in our real life practice.

Theme #3: The American Dream: Most of the characters in *Of Mice and Men* are dreaming of a different life - as movie stars or having their own land to raise crops and live on. The theme of pursuing something bigger and better in the future permeates throughout the novel; often thought of as the pursuit of the American dream.

My Take. Financial planning is a lot like this, we create projections of the future using the best information available and often with the hope that things will be bigger and better in the future.

As we face coronavirus, a volatile election season, and a society which lives on edge, I encourage everyone to take some time to return to reading the classics. It is very nice to relax under a warm light, to sit in a comfortable chair, and to quietly turn pages from the past, thus turning light on the present.



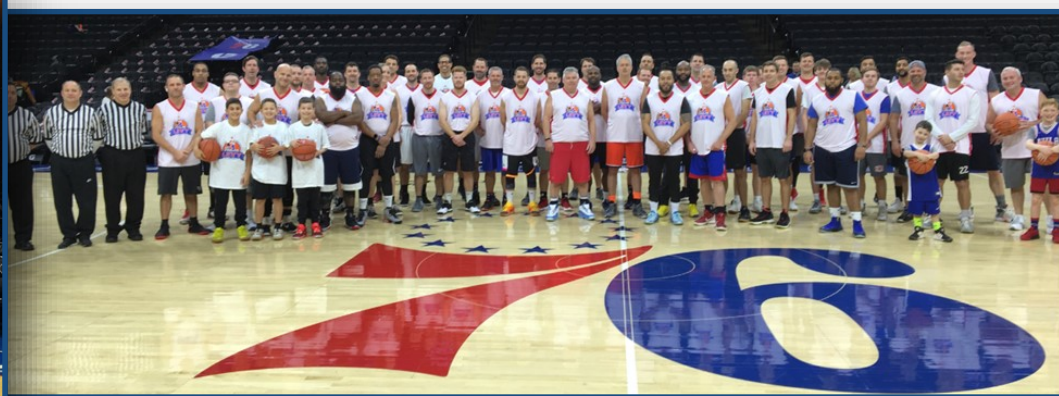


What's New With Me? by David Levy

I've been quiet the last few editions, so I thought I would bring you up to date on what's going on with me. The benefits division of our organization integrated with OneDigital. OneDigital is the country's largest growing organization concentrating in the employee benefit space. Our Team is proud to be the Philadelphia hub for the organization. Now with OneDigital, we will have additional resources of technology, compliance and other new developments in the works. Also, as a division of OneDigital, we didn't have to move and are still here at 1818 Market Street, and the team that has worked with me for many years has continued to be with me.

I am still active in the personal lines of individual life, disability and long-term care insurance. Victor and I are still co-principals of Leon L. Levy & Associates. Lastly, I still remain a registered rep with LPL Financial.

As a side note, most recently we had our 13th annual Levy Castle Family Foundation Basketball Tournament at the Wells Fargo Center. It was a tremendous success. To those that participated and contributed, Thank You!



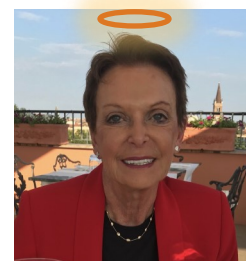
The Joy of Putting on Socks by Leon L. Levy



"I just want to be able to put on my socks again" is a comment/prayer I have made numerous times over the last few months.

On December 4th, I had a right hip replacement as a result of bone on bone in an old hip that was born in 1935. Surgery was the only solution after trying cortisone injections and other homeopathic remedies. After such a surgery, you are 100 percent in need of a spouse, life partner, or good friend to assist with just about everything, even something as simple as putting on your socks. For me, that person was my wife, Fran. It is impossible to lift and cross one leg over the other after surgery. To get my socks on, Fran had to lift my bad leg and hold it up while at the same time maneuvering the sock over my toes, instep and heel and then pulling it up. That to me was more humiliating than using a bedpan. The fact is that you are totally dependent on your spouse or friend for help.

The biggest goal for me was to try and walk without a cane and to raise my leg and cross it over the knee of the other leg to be able to put on my socks. Getting the leg to do that was a major accomplishment and graduation. In fact, I would say if you can find a devoted sock assistant, ask that person to marry you. Thank you, Fran!



Lucky Caribbean Cruise by Josh Goldberg, Controller



Over Valentine's week, my girlfriend and I went on the NCL Escape Cruise. The ports of call were Honduras, Belize, Costa Maya & Cozumel. We had pre-booked excursions for each port of call. While the weather was phenomenal each day - in the mid 80's to low 90's and no rain - the water was a different story; it was very choppy and murky. Two of our excursions were canceled for that reason, but we still made the most of it. In each port we were able to experience a nice clean beach with crystal clear water and some great food.

One funny story that I have from this vacation is that on the first day we explored the ship, stopping in many of the different shops and restaurants to get the lay of the land. At one jewelry shop, they had a promotional giveaway of a bracelet to any passenger who waited in line for one, as long as supplies lasted. While waiting in the line for the bracelet, they announced that everyone in the shop was entitled to one raffle ticket for a brooch pin and a pearl necklace that would be raffled off in a short while. With over 200 people in line or shopping, we waited for this raffle, but in the meantime, they had provided everyone with a glass of champagne. Holding my ticket in hand for the raffle, I started to listen to the staff member read off the numbers, and BINGO, I won the brooch pin. Then they announced the winning number for the main prize, the pearl necklace, and my girlfriend excitedly screamed, "I won!" We were both excited and couldn't believe the coincidence and luck of the draw for both of us to win

both the prizes in such a large crowd of people. I will wear my brooch proudly or give to my Mom or Bubbie instead. 😊

On the cruise we had a ton of fun doing all the activities around the ship. From the pool to the food, comedy shows and all the other entertainment, there was never a dull moment. I can't wait for the next time I can stand in such beautiful clear water and look down and see my feet. The Caribbean Sea is something I look forward to seeing again and can't wait for my next adventure.

Happy Adventuring!



"I've found that luck is quite predictable. If you want more luck, take more chances. Be more active. Show up more often."



- Brian Tracy



Josh and his girlfriend with the two winning prizes





Family Vacation by Joe Robostello

I recently returned from Cancun, Mexico where I spent a few days at an all inclusive resort with my wife Jill and our three kids - Evalyn who is five years old, Layla who is almost 4 years old and our son Teddy who is 15 months. We stayed at the Panama Jack resort, which was really a lot of fun as it was right on the beach and the kids absolutely loved all the water activities there. The highlight of our trip was not cooking, cleaning or doing laundry for a few days, which was pure bliss. I thought the resort was great for young families, and generally speaking I would recommend to all young families trying an all inclusive resort.



Joe's Family L to R: Evalyn, Layla, Jill and Teddy



Leon Fun Fact

Leon has been using a little black book for collecting and keeping phone numbers since he was a teenager. He recently wanted to replace it again, but his assistant convinced him to let her transfer the phone numbers from his little black book into his iPhone. When asked how he was doing with the new system, he said, "It's great; all I have to do is press a button."



LEVY CORE VALUES

We the staff of Levy Organization believe:

- *Clients Matter Most*
- *Teamwork is Essential*
- *Ongoing Knowledge Drives Success*
- *In Proactive Actions*
- *In Responding Urgently*
- *Accuracy is Critical*

Quarterly Update:

Upcoming Events

- ◆ Joe is attending the IRA Planning After the Secure Act seminar on March 20th
- ◆ Levy Wealth Management Group is sponsoring a program, *Responding to anti-Semitism in America Today*, at Temple Beth Shalom in Cherry Hill on March 10th

Upcoming Birthdays

- ◆ April 23—Joe
- ◆ May 6—Leon
- ◆ June 3—Victor
- ◆ June 30—Don

Milestones

- ◆ Congratulations to Joe Robostello upon earning the Chartered Financial Consultant Designation (ChFC®) from The American College of Financial Services.

Securities offered through LPL Financial, Member of FINRA/SIPC. Investment Advice offered through Levy Wealth Management Group, a registered investment advisor and separate entity from LPL Financial.