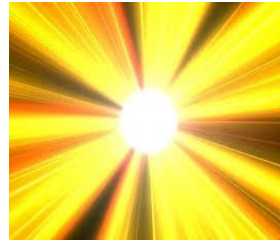




The Levy Light



"The best and most beautiful things in the world cannot be seen or even touched. They must be felt with the heart. Wishing you happiness."
- 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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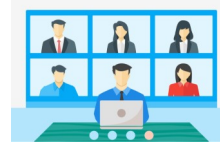
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Experiencing Life Virtually by David Levy

Typically, when we write these articles, we emphasize what is going on personally. Like for most of us, there is not much going on. However, I did want to share my current life of virtual meetings as I know we are all doing right now. We are using these virtual meetings for work and personal interactions. Meeting with clients for me is really broken down into four segments:



Quick Review/ Conversations with my OneDigital office team - We typically use Microsoft TEAMS. (Charlene, Maria, Greg, Jill and Ben)

Client Renewal Meeting - For this presentation, we schedule one hour, however they usually take less time.

Carrier Review - If we need to have a review with a carrier representative, we typically schedule these meetings for 30 minutes.

Client Open Enrollment Meeting - We schedule this type of meeting for one hour and we have been recording them. Once we record the session, we upload it to a YouTube account so that we can share with the client. In this way, the client can share the account with any staff member who has missed the meeting so that they can watch it on demand.

When I do these sessions, I am keenly aware of wearing my headset so that my audio is clear, and I also use good lighting for a better video viewing. In addition, we also add virtual backgrounds. Personally, I have a few background pictures that I have taken of Center City, Philadelphia. Then I also have some music and sports as well.

Like many of us growing up in the 1970's, when we started hearing more about ZOOM this year, we thought of the educational television program, which aired on PBS from 1972 to 1978.

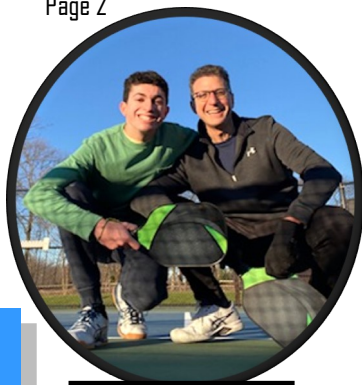


The 1970's PBS ZOOM television program

This past Thursday, I had 13 ZOOM meetings and 11 on Friday. In addition to ZOOM meetings for work, we also have plenty of ZOOM with family and friends. We just recently celebrated on ZOOM with my family, my Mom's birthday and Thanksgiving.

Hope to see you on a virtual meeting and, as a reminder, turn your camera on.





Lewis & Victor
at the pickleball court

The Other "P" Word by Victor Levy



My son, Lewis, and I have been playing pickleball during the pandemic. The courts are outdoors and just big enough to provide ample social distancing.

In a few short months that I have been learning pickleball, here are a few brief takeaways:

- There is an etiquette on the pickleball court (such as no cursing and providing ball assistance to neighboring courts).
- You can have a fun experience in 12 minutes, the average time for one game.
- You have to learn strategy in order to succeed, similar to other pandemic pastimes like chess and Rummikub.

I enjoy pickleball for the exercise and for the new friends I have made at the courts. If you have time, I encourage you to give it a try.

Q & A with Michael Clatterbuck about Coaching Soccer



Mike with sons, Jake and Mason, in their early years of playing soccer

Who is playing soccer this year? My sons, Jake and Mason. I coach and train them.

Can you please tell us what you like about soccer this year? It's a great sport in general—good exercise, very competitive and fun. There's the team aspect, which teaches the importance of communication and working together to achieve big picture goals. We do not have any superstars, just a solid group of young men who have been consistently getting better through hard work, growing/maturing, and having a wonderful coach (ha-ha). No one is bigger than the team and our success is based on everyone's energy, effort, and focus. No two players are the same. Players need to possess different skills and abilities to formulate good team chemistry and style of play. Regarding the individual aspect, that requires skills, strength, speed and competitive balance. It teaches how to win and lose with grace and dignity. Regardless of all the restrictions and protocols right now, it remains one of the only things we have that is normal.



What was the highlight of the season?

For me, it was watching the boys grow into young adults on and off the field. For the team, I would say that we went 2-0 in general match play, we went 2-0 in playoff and championship winning in dramatic penalty kick fashion both games. We did not give up a single goal the entire tournament during live play (only gave up three in two sets of penalty kick shoot outs). We beat one of the last remaining teams that we play frequently but have never beaten before. We did so in the finals. Very exciting PK shootout.

What comes next after season is over?

The season never ends really. It goes throughout the winter into the spring, then high school starts in the summer into the fall.



Coach Mike and his soccer team

My Recent Honor by Leon L. Levy



I would like to share with you a once in a lifetime experience that I recently had. In early September I was advised by The American College of Financial Planners, headquartered in King of Prussia, PA (formerly Bryn Mawr), that they wanted to honor me with their prestigious President's Award. This award recognizes leadership and benevolence to the industry and to the advancement of education and professionalism in financial planning representation.



Leon proudly holding his new award

On Thursday, November 5th, via a Zoom meeting, a Virtual President's Dinner of The American College was held with participants from across the country. I was given this wonderful award with some lovely words being spoken by the President and Chief Executive Officer, George Nichols, III. I am really overwhelmed and so grateful, with 67 years in the life insurance and financial services industry, for this recognition. I am happy to have been a part of helping create a difference in the lives of individuals, families and companies over the many years.

I want to take this opportunity to wish all my friends and associates a healthy and happy holiday season – A Very Merry Christmas and a Happy Hanukkah!



Tip Cronin of The American College of Financial Planners unofficially presenting Leon with The President's Award in the lobby of Leon's apartment building



Judith hiking at Hickory Run State Park & Boulder Field – a National Natural Landmark

A Refreshing Hike by Judith Trojnar, Client Service Manager

I took the day off for my birthday in October and treated myself to a relaxing hiking trip in the Poconos. The day was filled with glorious sunshine and 80 degree temperatures. I hiked in Hickory Run State Park and the Lehigh Gorge State Park. For decades I have just driven past these amazing locations on the Turnpike on my way up to my hometown, Utica, New York, admiring the views from the car. Lesson learned – stop to smell the roses!



Fun with the Kids by Jason Lawrence

My daughters, Brianna and Ashlynn, had a great time on a warm Thanksgiving playing in the mud. It's not often they can have fun like this in November.



Our whole family enjoyed the light show at Elmwood Park Zoo. It was a cold night, so keeping masks on the kids was much easier.



Ashlynn & Brianna

Leon Fun Fact:

When Leon is just about anywhere, besides his own home, he enjoys wearing a sportscoat. When asked why during these casual-dress pandemic times he still wears a sportscoat, he replied: "It's what I know, it's what I like, and for me not wearing a necktie is dressing casual."





Pivoting on Birthday Gifts by Betty Samarco, Administrative Associate

For many years, our firm has been celebrating the occasion of our clients' birthdays. This was a tradition that began in the 1970s, when Leon was first starting our business and at that time as today, he felt that a birthday is a special occasion that is worthy of celebrating.



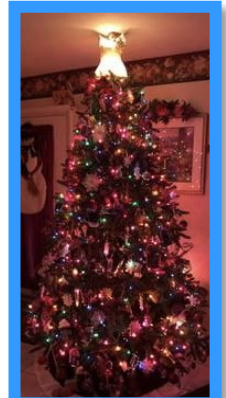
Bye-bye tie!

Over the years, many of our female clients have received a special gift like a compact or an umbrella, while men have traditionally received neckties. Getting these together is a lot of fun for us and it gives us a great amount of gratification when you receive them.

With the onset of COVID, everything has changed and our team felt it was no longer proper to send out these types of gifts during the pandemic. After hearing from some of you about this topic, we got together and decided as a team that the very best thing that we could do is to turn our birthday gifts into contributions to food banks in honor of birthdays. Since the start of this program a few months ago, and in the months ahead, the food bank that is located nearest to your home will be receiving a donation from us. Since our start, we have received so much positive feedback from you, our clients, as well as from the various food banks that have benefitted. Here is a brief list of some of the organizations that we have helped: Philabundance, Montco Anti-Hunger, Food Bank of South New Jersey, Manna on Main Street, Salvation Army of Atlantic City, Upper Darby Food Bank, Palm Beach County Food Bank, Southern Regional Food Distribution Center, and Food Bank of New York City.

On a personal note, I want to say that I know things are very different, right now, but we all need love and cheerfulness in our lives. We have a new granddaughter to celebrate with this year. Her name is Liliana and she was born in September. That makes eight grandchildren so far, and we are expecting another one in May. We are so fortunate and blessed.

I wish everyone a happy and blessed holiday, no matter what holiday you celebrate.



Betty's Christmas tree

From our Levy Organization bubble to yours, wishing you a Safe & Enjoyable Holiday!

Happy New Year - Yes, please!!

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 Birthdays

- ♦ January 10—David
- ♦ February 3—Lisa
- ♦ February 10—Michael

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