



The Levy Light



*"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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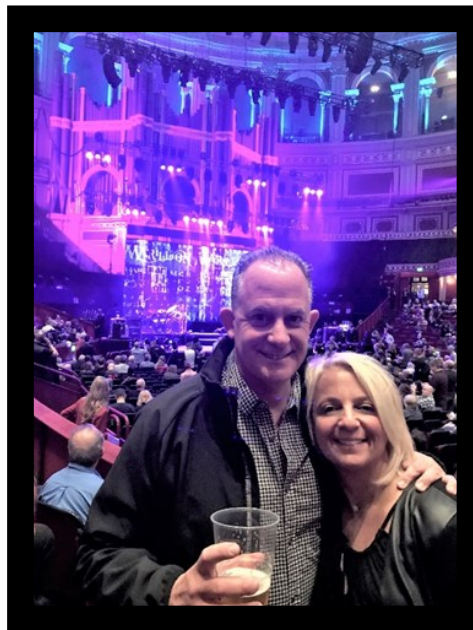


Reasons to Celebrate by David Levy

I have always been a music fan. Playing drums and going to live concerts is always a thrill for me. My favorite band is Marillion, a UK progressive rock band that has been around since 1982, with 18 albums over their career. They've never had the commercial success like Pink Floyd or Genesis, but this band continues to make wonderful music and creates an incredible live show experience.

Last January, they announced that in October they will be playing the famous Royal Albert Hall in London, England. I got the tickets and then told my wife, Jaimi, that we are going to London. A birthday present to myself, since I was starting a new decade.

We went and had a wonderful time walking around and exploring London for a long weekend. The show was amazing, and the band is releasing the show as a DVD this January.



David and his wife, Jaimi, at The Royal Albert Hall in London, attending the Marillion rock band concert

Leon Fun Fact: Leon has been wearing the same pair of gold cufflinks most every day since he graduated McCall Elementary School 70 years ago, which was a graduation gift from his mother. When asked where his mother bought them, he said, "They were from Dubrow Jewelers on South Street and cost \$25.00."





It's a Wonderful Life by Victor Levy

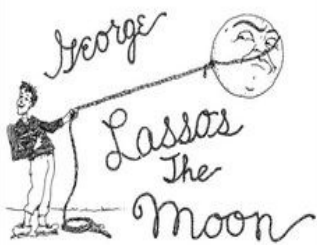
I had the opportunity to see the play, It's a Wonderful Life, recently as performed by the Cherry Hill High School East theatre troupe. My son Lewis had performed in the show and he and all of the students did an amazing job.

It is the story of a man named George Bailey. George is a dreamer who wants to travel the world, and whose life is constantly being reshaped by changing events. For example, early in the film George has a dream to see the world, but it is cut short by the untimely death of his father, a circumstance that causes him to take over the family savings and loan business. Then in the family business there is the great depression that takes over and people are worried about their accounts and he reaches into his own pocket to pay people their balances. Finally, the bank actually loses \$8000 of deposits that are necessary in order to support the loans. George feels he has let down everyone in his small town.

Eventually, he climbs the town bridge and prepares to commit suicide. Just then, he is visited by a guardian angel named Clarence, who grants him the wish of seeing his life through the eyes of one who has never been born. He comes to realize how important of an impact he has had on people's lives and how many bad things happened because he was not born.



Lewis with his Grandparents,
Fran & Leon



In the end, the story changes and he's back to his old self. There is a glorious scene, where the townspeople come together on Christmas and take up a collection for George to give him the \$8000 and much more. His guardian angel Clarence says: "Strange, isn't it? Each man's life touches so many other lives. When he isn't around, he leaves an awful hole, doesn't he?" And then: "Remember George, no man is a failure who has friends."

I was really touched especially seeing the high school performers working hard at their craft and it made me very appreciative for all that I have in my life. I am blessed with good health, a wonderful family, great work associates, friends and clients. I have much to be grateful for and at this time of year I can only reflect upon the

title of this terrific show which says it all - it's a wonderful life.



Emily with her four siblings in Philadelphia

There's No Place like Home for the Holidays by Emily Wernly, Intern



Another holiday season has somehow snuck up on us; my how time flies when you're a full-time business student with a 9:00-5:00 job! As I have gotten older, busier, and hopefully wiser, days have become obsolete as a measurement of time. I cannot remember what movie I watched last, or even what I had for breakfast this morning, but I can remember helping my grandmother make her famous Thanksgiving stuffing last year. I also remember seeing the Christmas light show in the Comcast building with my mom and two younger siblings last December. I remember getting those delicious toffee roasted nuts at the Christmas Village at Dilworth Park; you could smell them across the city. Some argue that they're impossible to resist. I don't know if this is true, but every year I seem to find myself sitting with a \$14 bag of roasted cashews wondering, "How did I get here?"

Needless to say, the holidays have always been a time filled with memories of friends, family, and food. I value this time more as I get older, as a special time when everyone takes a step back from their busy lives and focuses on what is truly important, building lasting memories with the ones we love the most.

I wish everyone a Joyful Holiday Season and a Happy and Healthy New Year!

Quote of the Quarter:

"The more you praise and celebrate your life, the more there is in life to celebrate."
-Oprah Winfrey



Levy & Associates Holiday Party at La Viola



Josh W. & Lisa



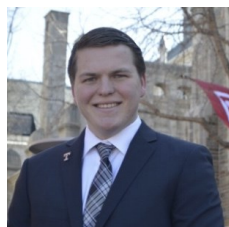
Emily, John, Paula, Mary & Betty



Greg, Victor, Joe & Josh G.



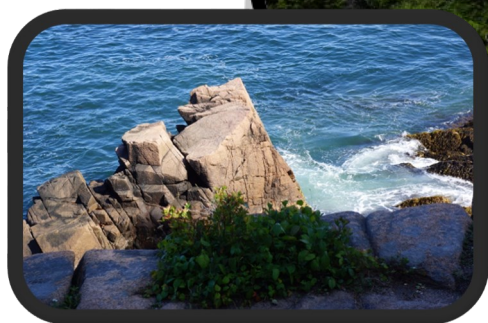
Charlene, Leon & Mike



Contrary to Popular Belief: Mountains > Beach by Kevin Malone, Intern

Growing up, my family and I were always beach vacation people. One week in the summer would always be blocked off for us to travel to the Jersey Shore, Outer Banks, or Bethany Beach to hang out in a rental home, catch up on our leisure reading on the beach, and enjoy a great dinner sitting around a table every night.

Now that I'm 22 and for three years have been out of the house that I grew up in, I figured it was time for me to try a new type of vacation. I spent June through August this summer interning from 8:00 - 5:00 and taking six credits of classes, so I spent numerous hours sitting inside in front of a computer. I was ready for an adventure. My friends and I decided to throw a tent and a few sets of clothes into a car and make a 12-hour journey up to Acadia National Park in Maine. I traded in the beach umbrellas and barbeques of my childhood for a sleeping bag and some trail mix. I was a little skeptical but excited nonetheless.



Kevin with his two friends
at Acadia National Park in Maine

Acadia's views and nature were breathtaking! I couldn't get over the beauty of the park. Since Acadia is located on the coast of the Atlantic Ocean, waves have crashed onto the rocky shores for hundreds of years. The massive granite boulders are carved in spectacular formations. On top of that, there were hundreds of hiking trails, mountains, rivers, and lakes that we were able to explore during our brief stint in Maine. It was a great week to get away and enjoy the great outdoors before I began my final year at Temple.

Not only did the spectacular wonder of nature make the trip amazing, but I also learned that I am more adventurous than I initially thought! The whole trip was out of my comfort zone, but I took a leap of faith and loved every minute of it. Now, I'll take the mountains over the beach any day. I'm looking forward to crossing the other U.S. National Parks off my bucket list in the very near future!

LEVY CORE VALUES

We the staff of Levy & Associates believe:

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

Securities and Advisory services offered through LPL Financial, a registered investment advisor. Member FINRA/SIPC. All entities referenced are separate and not affiliated with LPL Financial.

Quarterly Update:

Upcoming Events

January—Leon attending Forum 400 Meetings in New Orleans

Upcoming Birthdays

January 10 – David Levy

February 3– Lisa DiStefano & February 10—Michael Clatterbuck

March 29—Josh Wielgus

Milestones

Greg Harrigan passed the GBA—I Course of the CEBS Designation
Victor Levy—The Jewish Voice of Southern New Jersey published an article about Victor, featuring his book, The Kitchen Table Financial Plan

In Memoriam

September 27—Mary Gibson's Father, Sal DeBellis