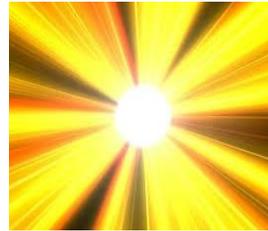




# The Levy Light



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

Special points of interest:

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

## Basketball Tournament to Benefit Juvenile Diabetes by David Levy

As some of you know, my wife, Jaimi, and I founded the Levy Castle Family Foundation in an effort to assist finding a cure for diabetes. Each of our sons, Jack and Sam, were both diagnosed with juvenile diabetes, Jack at age 3 and Sam at age 19.

On Friday, February 8<sup>th</sup>, 2019, we held our annual basketball tournament to raise money for diabetes research. My family and I started this basketball tournament several years ago to raise funds and awareness for this great cause, and since we are a family that loves basketball, we thought it would be a fun way to raise funds for the cause.

The fun of the day was shared among 46 supporters, who donned our Levy Castle Foundation basketball jerseys and played some hard fought serious basketball on the floor of the Wells Fargo Center. There were seven teams, four referees and a winner. The winning team was from New York.

After the tournament, we watched the actual Sixers game, which was tremendous with many of the new players making their debut. It was a close game with the Sixers beating the Denver Nuggets, 117-110.

We all witnessed the magic of retiring Moses Malone's number to the Wells Fargo Center rafters. We had Philadelphia Eagles' Freddie Mitchell join us for the day as well.

All of the pictures and videos will be on our website: [www.levycastlefoundation.org](http://www.levycastlefoundation.org)



Jack and David Levy

### LEVY VISION STATEMENT

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

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*Juliet: "What's in a name? That which we call a rose by any other name would smell as sweet."  
-William Shakespeare, Romeo and Juliet*



## Introducing - The Levy Organization by Victor Levy

I have noticed over the years that there is no article announcing a name change that does not begin with William Shakespeare's famous quote from Romeo and Juliet. It is appropriate here as we have changed our organizational name but not changed the sweetness of who we are as a conscientious and caring financial organization.

But lest you think we did this on a whim, I will have you know that our leadership team worked hard on this, trying to capture the essence of who we are, without completely losing our identity. We scheduled many focus meetings in which we each brought ideas. Some were considered, and others were discarded. Suggestions were revived, then discarded again. It is a stressful thing as we wanted it to be perfect and no one wanted to hurt anyone's feelings. Throughout the year, we moved away from certain ideas and then returned, allowing more time for proper reflection.

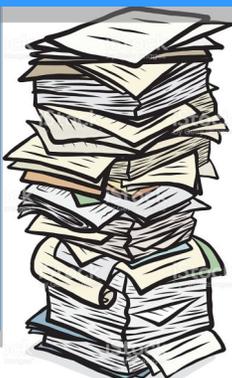
We often thought about how our father, Leon, started the firm in 1971, and how he began with the idea that we were an organization first - hence our name, Leon L. Levy & Associates. He would say in public over the years that his emphasis from the start was on the word "Associates." Dad has been very proud of this legacy. His emphasis was on team work and who we are as an organization, apart from the personality of the advisor. It was our goal to capture this philosophy as we plan out our next 50 years.

So, with a drum roll and a launch of a bouquet of bright balloons, we are proud to announce our new organizational name - Levy Organization. We feel this name suits who we are as a team of three companies and it helps us streamline things so that we are properly organized, not just in our ongoing work product, but also in our marketing and branding efforts.

We created Levy Organization as an umbrella and under it we have proudly placed our three subdivisions - Leon L. Levy & Associates, Levy Wealth Management Group, and Levy Benefits Advisors. Here is how it looks together -



For nearly 50 years, we have worked hard to establish our reputation in all aspects of insurance and financial planning and we hope to continue doing the same well into the future.



### Leon Fun Fact:

**Our firm is officially paperless. When Leon was asked about this achievement, he said, "I happen to like my paper—I can hold it, write things down on it, and put it in my pocket. Paper works just fine for me." Oh Well...**





## We're Never Too Old to Learn by Leon L. Levy

I thought I would bring you up to date on what's going on in my life. My wife, Fran, and I are both doing well. This May 6<sup>th</sup> I will turn 84, and Fran will turn the big 8-0 on November 25<sup>th</sup>. I am still coming into the office doing my thing alongside of Victor and David, who are doing a great job taking care of all our clients.

I wanted to share a fascination of mine, Egyptology, and the ancient history of the Pharaohs. I am currently taking a wonderful course at the University of Pennsylvania, called The Land of the Pharaohs. As you can imagine, I at my age and wearing a jacket and tie, I stand out like a sore thumb in a class full of young people all dressed in t-shirts and jeans, and many with the trendy ripped jeans.

The course is very interesting and Egyptian history is full of art and a belief in many different Gods and Goddesses, such as God of Sun & Radiance, God of Knowledge & Wisdom, Goddess of Motherhood, etc. A fun fact I learned is that the Egyptians were drinking beer back 3,000 years ago.

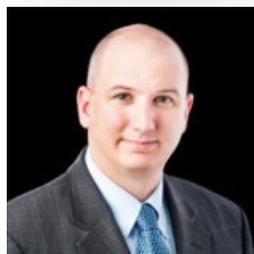
I may be an "old dog," but I continue to enjoy learning new things.



Sculpture of Pharaoh, Ramses II, wearing cobra Egyptian God crown



Replica of The Golden Mask, placed on a mummified body to help them enter into their afterlife



## Meet Our Newest Financial Advisor, Jason Lawrence

The Levy Wealth Management Group is proud to introduce Jason Lawrence. Jason joined our firm recently as an associate Financial Advisor who comes with a great depth of expertise in 401(k) plans. The Levy Light has asked Jason to share a little about himself:

**About my professional background**—I graduated from Drexel University in 2005 with a degree in finance. I began my career in managed account trading before moving into a role as a Financial Advisor in 2009 at AXA Advisors. It was there that I grew professionally and worked with clients to develop and implement retirement plans and also provided fiduciary investment advice to 401(k) retirement plan sponsors. I joined Levy Organization in September 2018 and look forward to continuing the excellent work Levy Organization does for our clients.

**About my personal life**—I am married to Alissa and have two amazing daughters, Brianna (4) and Ashlynn (2) and recently moved to Lafayette Hill. Growing up, my parents worked hard to provide a good life to myself, brother and sister. I am an avid Philadelphia sports fan, and enjoy bowling now as well. Growing up I enjoyed wrestling, rowing, hiking and camping.

**Something fun I've done lately**—Our family recently took a trip to Disney. The girls had a blast while wearing mom and dad out. My oldest, Brianna, loves roller coasters and had no fear when tackling Tower of Terror, while Ashlynn got to meet her favorite princesses, Anna and Elsa.

**My 2019 educational goal**—I am working towards my CFP designation and will complete my studies in early 2020.

**What I love about the Levy Organization so far**—I love the atmosphere and the team here at Levy Organization. From day one I could see the care and thought that goes into each client. I appreciate the opportunity to help our clients achieve their financial goals.



Jason with wife, Alissa, and daughters, Brianna, age 4 and Ashlynn, age 2

Family



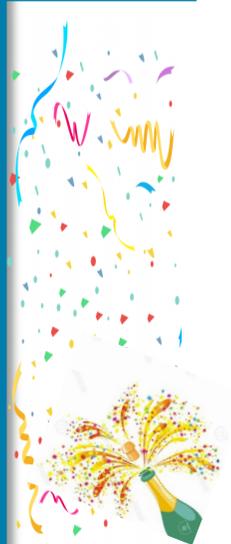
Lewis with his proud grandparents, Fran and Leon

Victor's son, Lewis, performed in the Cherry Hill High School East production of The Man Who Came to Dinner



Lewis on the right, along with fellow performers at a mime performance before the show

### Our annual holiday party at LaFontana Della Citta in December



#### 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

- ◆ April—Mike will be attending the LPL Financial Summit Conference in Hawaii

##### Upcoming Birthdays

- ◆ April 23—Joe
- ◆ May 6—Leon
- ◆ June 3—Victor, June 17—Anna, June 30—Don

##### Milestones

- ◆ Greg & Yvette welcomed Child #2 in September—their son, Rory
- ◆ Joe & Jill welcomed Child #3 in December—their son, Theodore
- ◆ Jason passed Part I of his CFP Designation

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