

# The Levy Light



*A journey of a thousand miles begins with a single step. —Lao Tzu*

## My Week in Ojai, California by Victor Levy



Victor, Lewis & Red

A vacation to California...in the middle of a pandemic? I know what you're thinking – you must be kidding. But, let me share how we accomplished this amazing feat.

First, a little background. My wife, Suzanne, and I have not been on a vacation for a very long time. When the COVID-19 case numbers were going down over the mid-summer, LPL Financial announced it was conducting a small conference at a resort called the Ojai Valley Inn in Ojai, California. It is a small town just outside of Santa Barbara that is known to be artsy and with a spiritual vibe. So, we read over the email about safety, we looked at each other and said to one another, "Let's go."

As our first step, Suzanne bought N-95 masks (yes, these are the big guns and are now available on Amazon), we cautiously maneuvered our Moderna vaccinated bodies through the airport on departure day, got on the American Airlines flight (where we were told the air is filtered every 4 seconds), watched the passengers around us carefully, and got to the resort in one piece.

Once there, we had a great time. We were joined by our youngest sons, Jonathan and Lewis (our oldest, Ben, had to work), and we did tons of fun outdoor activities. The highlight of our trip was a three-hour session that we spent at the ranch of Andrea Gaines. Andrea is horse enthusiast that is into equine awareness and mindfulness. We arrived at her ranch and we were led to the back where we were met by two beautiful and large horses – Red and Flash. These were rescues and it was Andrea's goal to help people develop connection with these animals through meditative exercises.



Suzanne and Flash

Long story short – we were terrified in the beginning of being next to gigantic horses and in the end we were ready to adopt one. Imagine sitting on the ground while the horses roam around next to you, then placing your hands on the horse who read your mind (says Andrea, and we believe her) then getting the horses to follow our commands. It was so great to feel the horses up close and Andrea led us through several guided meditations along the way. We all left learning a bit more about ourselves through these four legged mammals who we now call our new best friends.

We returned back to Philadelphia, feeling refreshed and happy. Of course, what is next is anyone's guess but as we learned from Red, the horse that is, take one day at a time. 😊



Victor, Suzanne, Jonathan & Lewis with one of their new besties.

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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## Our Legacy by David Levy



David & Paula at the office, 1995

When we hear the word "Legacy," it means many different things, but in our office it means our staff that has been with Leon L. Levy & Associates for a very long time. At the end of September, Paula Gill will be retiring after 45 years working for our firm. If you know Leon, he always envisioned a company with many associates. Some associates went beyond that and became family.

One of the first people I met when I was a kid going to work with my dad was Paula. When I was 13 and had my Bar Mitzvah in the mid-1980's, Paula had learned calligraphy and did all my Bar Mitzvah invitation envelopes. The office staff had a table at the Bar Mitzvah, and it was great seeing

the legacy Leon L. Levy & Associates staff, including Paula and her husband, Joe Gill. Also in the 1980's I had a summer job working in the office, at 1510 Walnut Street, and I got to know the staff pretty well at that point. Then during college I was interning for Phoenix Mutual and was able to work at the company's next address, The Bellevue at Broad and Walnut Streets. While I was in the office, Paula displayed a typing speed certificate, and I remember being amazed that she could type 140 words a minute.

As I grew in the office, I had the pleasure of Paula assisting with typing and editing my letters, which she did superbly. Although we still see each other every day at the office, she does not assist me any longer and works in other areas of the firm, assisting with customer service and various administrative duties. About five or six years ago, Paula took over editing The Levy Light, which shows her artistic talent and editorial skills.



Paula Gill, 1978



**DANGER, DANGER, DANGER!** Like her typing, Paula does everything at a rapid pace, and she is extremely focused. She walks fast, she works fast, and she likes to constantly exercise. She moves so quickly that she sometimes misses a curb or step and lands hard causing her to have some bodily fender benders. Also, when she is working she can easily be startled in the office, so when I walk near her I use an extra heavy plod so she can hear me coming. If she is startled, get ear plugs!

45 years of great service, and since she is so fast, it's more like 90 years of work! Wishing Paula (and Joe) all the best in this new stage of life. Also, since Paula only lives 48 feet from the office, I'm sure we shall see her soon.



Paula & Leon at the staff holiday dinner, 2003

## This is Not Good-Bye by Leon L. Levy

I would like to share a big life event. As I mentioned in last quarter's Levy Light in commemoration of our 50<sup>th</sup> Anniversary of the firm, I started Leon L. Levy & Associates in July of 1971, and I still enjoy coming into the office about three hours a day Monday through Thursday.

Back in 1976, Paula started out with our firm as a young newlywed, who had just relocated from Brooklyn, New York to South Jersey. She would take the High Speedline into Philadelphia each day and worked from 9:00 to 5:00, at which time she would promptly leave to attend exercise classes at Elaine Powers.



Paula and her husband, Joe, eventually moved to Center City about ten years ago, where she has approximately a three minute commute to the office. Paula still comes in every day with a smile on her face and that fiery red hair for which she is known. She still regularly assists me on top of her many other office duties. She recently announced that it is time for her to retire. Selfishly, it is quite sad and a bit traumatic for me to have someone leave who has been in my life for that long, who knows exactly how I work and

## "To Sir with Love" by Paula Gill, Administrative Associate



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Dear Leon,

After 45 years of working with you and this wonderful family firm, I have made the big decision to leave and be on my own schedule, but before I leave I wanted to write you this letter here in my last Levy Light.

When I joined Leon L. Levy & Associates as a 20 year old newlywed, I was naïve and still quite immature in many ways. Although I had worked in Manhattan as a secretary for two years prior to taking the job at your office, it was a big culture shock for me at your office because everyone had piles of work to do, and I actually contemplated leaving after a couple of months. I was used to a job that allowed for reading the newspaper in the morning, going out for an hour or two at lunch and much time spent socializing in the office. That is crazy to think of now, so the first and biggest thing I learned from you was a good work ethic.

You taught me so many things throughout the years, but I will just touch upon a few of them. We used to have our monthly office meetings at fine restaurants in Center City. My first lunch meeting was at Old Original Bookbinder's, and I told you that the only fish I liked was a tuna salad on toast (which is what I got), but over time you encouraged me to try other seafood. Through my office dining experiences, I eventually ate all kinds of seafood, and even split a lobster with you at one of our company anniversary dinners. You often acted as a father figure and used to remind me to slow down and to walk straight, so I learned to straighten up, although I haven't slowed down nearly enough as I should. You enjoyed playing Jazz and Classical music on your office stereo and I became a fan of Jazz music too. I learned to appreciate and acquire art through your influence. You and Fran have such an amazing collection of art in your homes, and I am grateful that Joe and I have collected over 50 original art pieces that we have displayed in our humble and happy apartment here in Philly. I have gone to you with many situations and problems, and I so appreciate how you have always taken the time out of your busy schedule to sit with me and help me work through these matters. You are such a generous man and have shown me how important it is to give to the world through time and money.

I feel very fortunate to have been with this company for the length of time I have and to have the mutual respectful relationships that have been built within this company. Lastly, I want to thank you, Leon, for all you have taught me and have done for me, and I want to thank Victor and David, too. Leaving here is certainly the end of an era for me, but I am looking forward to a brand-new chapter in my life, and I know I will be seeing you in that next chapter.

Love,  
Paula



## Introducing Tim DeCarolis, Client Services Associate



Tim with a friend playing golf in Arizona

I grew up in Hatboro, about 30 minutes North of Philadelphia. I come from a blue-collar family. My parents really demonstrated the importance of a strong work ethic, and I am forever grateful they taught me this at a young age. I played soccer and baseball growing up and went to Upper Moreland High School in Willow Grove. After High School, I went to Temple University to study business with a focus in Marketing. When I got out of college, I decided I wanted to focus on tackling my student loans as quickly as possible. Through that journey, I educated myself on personal finance and realized I wanted to pursue a career as an advisor. I worked at JP Morgan for 4.5 years in the Corporate & Investment Bank before joining Levy Wealth Management Group. I am on the path of becoming an Advisor, so I can help people achieve their financial goals.

In my spare time, I enjoy playing golf, working out, and spending time with family and friends.



**This is Not Good-Bye (Cont'd from Page 2)**

how our business works, besides being someone who has been there for all the happy and the sad times. At this point, I am not sure how it will work out without her.

It is with much pride that I give a big public thank you to Paula for sharing 45 wonderful years with me and sharing in all the big life events of my family, including the Bat Mitzvah and Bar Mitzvahs of my children and the Bar Mitzvahs of my eight grandsons. She has shared in the joyous occasions of all the weddings of my children and the births of all our grandchildren and our first great grandchild. My sons, Victor and David, are running the various entities of the firm now and collectively we thank Paula for being here with us through all the growth and the success that we have had.



Paula is a big part of the history of Leon L. Levy & Associates, and we are more than associates, we are old friends. We shall keep in touch.



**Meet Brad Hess, Client Services Associate**

I am originally from Medford, New Jersey and have been living in Philadelphia for the last six years. I graduated from Towson University with a degree in Accounting in 2009 and became a Certified Financial Planner™ in 2019. I started my career at ING Financial Partners as a Registered Representative, before moving on to a firm in Princeton called Traust Sollus Wealth Management, and then prior to Levy Wealth Management Group, I worked at Goldman Sachs Personal Financial Management as a Relationship Manager for five years.

My goals for the future are to develop into a Wealth Advisor at the firm and to continue to serve and help my clients navigate their financial future to allow them to achieve their goals.

In my free time, you can find me on a soccer field training the next generation of goalkeepers. I have been training goalkeepers ages 9 through 16 for five years now and it is something that I find to be very rewarding as you see the kids continue to develop, grow confidence, and reach new heights. When I am not on a soccer field, I enjoy going to the beach (LBI) in the summer or snowboarding in the winter. I enjoy staying active playing soccer, playing pickleball, and exploring the city with my girlfriend, Susan.



**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*



**In Memoriam:** Our long-time associate and friend, Don Allen, passed away on July 15, 2021, after a battle with cancer.

Don was a beloved member of our team. He was incredibly smart, highly conscientious and one of the most caring and empathetic people that you could know. He and his wife Pat, along with their three children, made their home in Bucks County and he was usually the first to arrive and the last to leave our office. He represented the very best of what our firm is all about.



We know he is looking over us as he has always done as a trusted and important member of our organization. His friendship will be missed by us all and he has made a permanent contribution to our success and our firm.

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