

The Levy Light



Quote of the Quarter

*"Remember tonight, for it is the beginning of always."
—Dante Alighieri*

Our Bike Drive by David Levy

In 2019, Levy Benefit Advisors integrated its practice with OneDigital, the largest employee benefits organization in the country with over 3,000 employees spread out over 200 offices. The Philadelphia region is one of the top five markets for OneDigital. As we joined in the region with other offices, we started a charitable committee of which I am the chairperson. We recently participated in the assembly of bicycles for underprivileged children in conjunction with the JAWS Foundation., a youth organization located in the Greater Philadelphia Region focusing on the health and wellness of local children. Over 200 bicycles were assembled and given away. I personally assembled over 30 bicycles. My take from this was that it felt great to do something good for a worthy cause.



David with Ron Jaworski



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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A New Year's Reflection by Victor Levy

I always like New Year's Day because it signifies a new beginning. It reminds me of the feeling I get when we start a new financial plan – it fills me with a sense of hope, of getting organized and of gaining elusive control.

This year was one of transition at our firm. We lost a beloved team member, Don Allen, to cancer and a few of our long term employees retired. Furthermore, the pandemic has continued to reshape our working lives - how we conduct meetings, communicate with one another, and how we bring services to our many clients. It is different today than it was two years ago.



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A New Year's Reflection by Victor Levy cont'd

Internally, our team is growing. You will see many new faces as we begin 2022. These are talented seasoned professionals that have sought out our firm as a place to call home. Some of our new team members include Rex Schilgen, who will be assisting us with portfolio oversight, Tim DeCarolis, who is working as an operations associate and is on track to become a CFP, Michelle Tinsman, who will be serving in the role of Senior Operations Manager, Brad Hess, who is working with us as a financial representative, and our newest addition, Desiree Fusco, who will be working as a receptionist and administrative assistant. Over the last few months, we have all been getting to know one another and learning how to best work together. My initial report back to all of you is very positive – our team is well poised to continue building and serving our many families and households.

On the personal front, I have set a goal for our team to bring into our culture in 2022 an improved work life balance. Working hard is definitely part of our team spirit, but also it is important to have time for oneself so as to prevent burnout and to make sure that we can all spend time with our families. The pandemic has taught us that it is easy to get engulfed in work with emails that never stop or phone calls that need to be returned. Equally, it is important to try to take care of oneself and make time for "re-creation."

Finally, I would like to wish all of you, our many clients and friends, a healthy and Happy New Year. We have much for which to be grateful and thankful and I hope that this New Year's season is one of positive reflection and resolution.

Nice To Meet You by Rex Schilgen

I grew up in Phoenixville, Pennsylvania and have lived in Philadelphia for the past six years. I am a graduate of the University of Delaware and have a Bachelor's of Science degree in Finance and Economics.

Prior to joining Levy Wealth Management Group, I was a Vice President & Trading Specialist at Pershing LLC, a BNY Mellon Company. I am excited to continue my career at LWMG where I serve as an Investment Analyst, working to help our clients achieve their financial goals. My favorite part of working here so far is seeing how much our advisors truly care about their clients.

Outside of work, I am involved in the University of Delaware Men's Crew Alumni Association as a board member and co-chair of our annual golf outing. I also serve as the mentorship chair of the St. Josephs Prep Young Alumni Leadership Council, where I connect current students and recent graduates to alumni that work in their field of interest. I am also a member of the golf society at the Union League of Philadelphia.

In my free time I am an avid golfer and some of my favorite memories are on the golf course with my family and friends. In the summer, I enjoy spending time down the shore with friends and family. I look forward to 2022 and getting to know our many clients.



In Memory of Don Allen

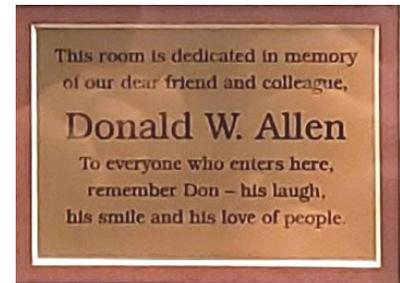


Don Allen



Remembrance Plaque

On December 15th, we had a ceremony in our office in which we dedicated our conference room in memory of Don Allen. It was a heartfelt day as we were joined by Don's wife, Pat, along with his three children - Christine, Don Jr., and Kaitlin. We shared many memories of Don and hung a plaque on our wall to commemorate the occasion. (From Left to Right: Michael, Victor, Pat, Christine, Don Jr., Kaitlin and Leon)

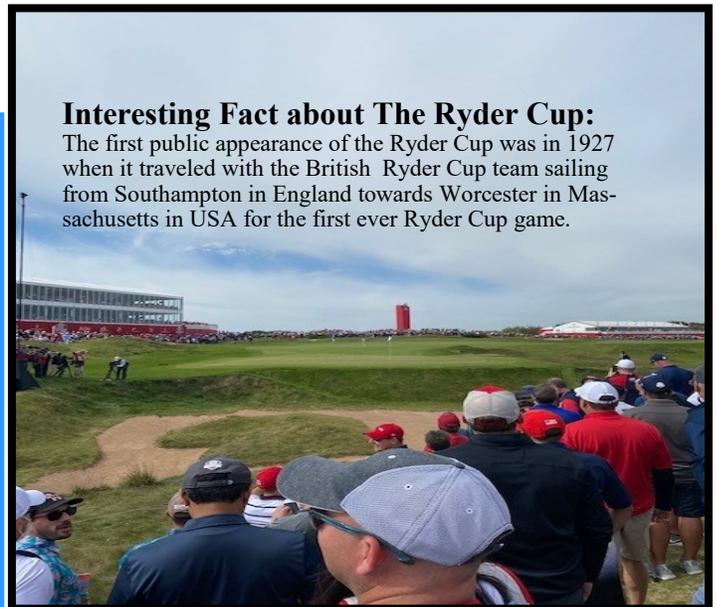


Tim Attends The Ryder Cup

Tim DeCarolis, along with 6 family members, recently traveled to Whistling Straits Golf Course in Wisconsin for the Ryder Cup. There they attended all three days of the competition between the United States and Europe. In the past, Europe had won six of the last nine competitions, but the USA dominated this year winning effortlessly.

Interesting Fact about The Ryder Cup:

The first public appearance of the Ryder Cup was in 1927 when it traveled with the British Ryder Cup team sailing from Southampton in England towards Worcester in Massachusetts in USA for the first ever Ryder Cup game.



Leon Fun Fact: Recently, Leon had used up all of his personal stationery which he uses to write notes. When asked about using email, Leon said, "Please order me a new box of stationery on Crane paper. Email is okay but it does not replace a thoughtful handwritten note."



Soccer Generations



Michael (on the far left) with his sons' soccer team



Newly Engaged

Ryan Hogg and his fiancé Talia recently got engaged during a morning sunrise on the beach during a trip to Charleston, SC.



Michael has been coaching his sons, Jake and Mason, in the Hempfield Fall Classic soccer tournament in Lancaster, PA for five years. They won the 2021 season without giving up a goal, making it their second year in a row winning first place! Michael's sons, Jake, age 17, and Mason, age 16, are both on the team. They have been playing organized soccer since about five years of age. After the 2022 New Year, they will continue league matches and college showcase tournaments.

Every story is beautiful but ours is my favorite



Jason carving a pumpkin ←

Jason as the Headless Horseman with his daughters celebrating →



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:

Tim and Brad both completed their Series 7
Rex completed his series 66

Upcoming Birthdays:

Rex-December 15th
Tim-January 25th
Lisa-February 3rd
Michael-February 10th

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.