

The Levy Light



A Week in Switzerland by Victor Levy



Family photo in Basel

Since the start of the pandemic, our family has not gone on a true vacation. Like so many others, we have been hunkering down, waiting patiently for a day when we could safely travel again.

The opportunity came this summer as our youngest son, Lewis, was studying abroad in London and our oldest son, Benjamin, was backpacking through Europe. For us, it was the perfect opportunity to getaway.

We decided to go to Switzerland, a central place in Europe with just enough history and scenery to fill a week and an easy enough meeting place for all of us to reach.



Swimming in Zurich

The weather was perfect, sunny and 75 degrees, and everywhere we turned, in every direction was natural beauty.

Some of the highlights of our time together included a tour of the Lindt Chocolate factory, taking a cable car to the summit of Mount Pilatus, visiting the picturesque village of Grindelwald, going on a mountain toboggan, and jumping off a bridge (not very high) into the cool fresh Limmat River on a hot day in Zurich.



Jonathan and Lewis at Dinner

My personal favorite moment came early in the trip, when we all came together in Lucerne. It was Lewis' 19th birthday and we all agreed to meet at 7 pm at an Italian restaurant near our hotel. We had not been together as a family for quite some time, especially with our son Ben who we had not seen for two months, and it turned out to be a magical night in a magical city. The food was delicious, and we were together again as a family, with hugs and kisses for all.

Traveling together is a wonderful way to keep family bonds strong and it was just what we all needed. I am beginning to dream about next summer's plans. More to come.

Quote of the Quarter:
"There's only one thing more precious than our time and that's who we spend it on"
-Leo Christopher

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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Germany by Lisa DiStefano



Lisa (on left) & friends

I was very happy that my canceled trip to Germany in 2020 was finally rescheduled to July, 2022. A bonus was a short stop in Amsterdam. The city is famous for many things, but I couldn't get past the amount of bicycles. There are bike garages there like we have car parking lots here.



From Amsterdam we headed to Germany to see our friends from Philly, The Hooters, who were on tour there for the summer. We went to Alme, Bochum, Hamburg and Karlsruhe. We got to see some fantastic shows and were able to catch up with German friends as well as make some new friends along the way. We cannot wait for our next adventure and see where we end up on our next trip!



Happy Anniversary

Our 60th Wedding Anniversary by Leon L. Levy

Dear All: I wanted to share with you a wonderful event that my wife, Fran and I shared this past June 24, 2022 with our family. This day was the 60th Wedding Anniversary of our wedding. Believe it or not, it felt like our wedding day in 1962. That may sound very corny and theatrical, but it is true.



Fran & Leon

I thought it would be nice if I was to take the entire family out to a celebratory dinner with a special cocktail hour and deluxe dinner. I arranged this evening with the Union League in Philadelphia to have a private room with a cocktail hour and hors d'oeuvres. We followed with a special private dining room with flowers, wine and a full party atmosphere. We had our children, spouses, and all eight of our grandchildren joining, plus my granddaughter-in-law, as well as a future granddaughter-in-law. As a surprise by my children. They also, invited a dear friend and opera singer, Dan Pantano, who serenaded us with some special songs.

It was very special to all of us, and I am so happy to share my good fortune with you. Stay well.



Leon and Fran With Dan Pantano.



The Levy Family



Leon & Fran Cutting Cake



Maccabi Games by Michael Clatterbuck



The Maccabi Games is a week long multi-sport event promoting Jewish pride through sport, educational, and cultural experiences. My son, Mason, had the honor of representing the Philadelphia delegation in the 2022 Maccabi Games held in San Diego in early August. He competed in a round robin soccer tournament over the course of a week and played against delegations from across the country. His team played great throughout the tournament and won a bronze medal, but more importantly, the boys had a wonderful life experience and built relationships with a lot of great people. We



The Maccabi Team featuring Michael's son Mason (pictured in the back row 4th in from the right)

are very proud of Mason for his hard work and his accomplishments on and off the field.



Meet Leigh Bucholtz



Leigh Bucholtz

I am the newest member of the incredible Levy Wealth Management Group team, joining last quarter as Director of Advisory Services and Director of Client Relations at LPL. It has been so wonderful to be a member of this team, one that is so devoted to clients and long term planning.

Quick introduction - I am an animal lover who periodically volunteers for a shelter in Blackwood, NJ. I am also trained in mixed martial arts and recently achieved my boating license.

My real passion is traveling. I have been to twenty-three countries throughout the world and most recently, I took a trip to North Carolina to meet up with my former Girl Scout troop (yes you read that right). I was a brownie that crossed the bridge (literally) into the Girls Scouts, which I enjoyed up until the sixth grade. The women of Troop 488 and I continue to stay connected and make every effort to meet as much as we can and that our busy lives will allow.

I look forward to meeting many of our clients and hope to help the our team continue to enhance the client experience.

Leon Fun Fact: Leon is known to use his pants presser daily as part of his morning routine. When asked why he presses his pants daily he said, "It's important to begin each day looking your best! I feel like I think better when my pants are wrinkle free."





Wedding Day by Ryan Hogg

My wife, Talia, and I were married on June 12th at Aldie Mansion in Doylestown, PA. Planning a wedding in six months is not easy (and Talia deserves the lion’s share of the credit). Everything from the venue, to the food, to the band was perfect. We couldn’t have asked for a better day with the family and friends who mean the most to us.



Ryan & Talia



Ryan & Talia

Two days after the wedding we left for our honeymoon, traveling to Florence, the Tuscan countryside, and Lake Como in Italy. Italy is one of the most spectacular places I’ve ever been, particularly the area of Tuscany outside of San Gimignano and the towns of Bellagio and Varenna in Lake Como. Pictures do not do it justice and we felt very fortunate to be able to experience such a beautiful country together, and to start our life together in this way.



Meet Vicky Freece



Victoria Freece

I am a recent addition to the Levy Wealth Management Group team, joining as Director of Operations last quarter. I am spending my days getting to know the team, learning about the unique history and culture of the Levy family, and unpacking the complexities of the business infrastructure. In my brief time with the organization, I have learned about the importance that we place on good client relationships, doing the right thing for our clients, and being present.

In my free time, I enjoy traveling with my husband, Mark. As an avid fan of all forms of wildlife, some of my travels have allowed me to encounter many types of interesting animals. When I am at home, you can often find me watching the wildlife in my backyard while doing a crossword or sudoku puzzle.

LEVY CORE VALUES

Our Levy team believes:

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

Upcoming Birthdays:

Donna Oct 14th
 Desiree Nov 6th
 Josh Nov 22nd
 Rex Dec 15th

Upcoming Events:

Team lunch every Wednesday which we call Wonderful Wednesday.

Milestones:

Brad Hess just celebrated his one year anniversary with our firm.



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