



## The Levy Light



### A Day in Lewes, DE by Victor Levy



From left to right—Victor, Suzanne & Lewis returning from Lewes.

I went to Lewes, Delaware recently to visit some friends who recently moved there from Cherry Hill. If you have not been there recently, or at all, here is a personal update on this quaint beach town.

When you first arrive there via ferry from Cape May, as I did along with my wife, Suzanne and our youngest son, Lewis, you can't help but notice that there are many housing developments being built, just steps from the landing pier. All look very similar—generally appearing as homes for people at a later stage in life (55+ style), until you pass the brand-new state of the art Lewes Regional High School, and then you realize that perhaps there is more going on here than meets the eye.

The more famous Rehoboth Beach, where President Biden has a home, is five minutes away and the Coastal Highway which gets you there, as well as to other towns like Bethany Beach, Dewey Beach, and further away, Ocean City, Maryland, is lined with major stores and national chains. And, they have some cool local restaurants. For example, we had dinner and one called The Crooked Hammock which served craft beer in an outdoor setting (think grassy, lawn chairs, acoustic guitars, and a corn hole).

We saw that Lewes has some beautiful and somewhat rustic beaches. As you enter on the ferry, there is a state park next to the terminal with beautiful white sand beaches, overflowing with people outside taking in the sights and sounds.

Overall, it was a nice day and worth visiting, especially on the comfortable ferry that leaves from Cape May.



Arriving at Lewes, DE from Cape May, NJ

*Quote of the Quarter:*  
"Life is not a competition. Life is about helping and inspiring others so we can each reach our potential" ~ Kim Chase

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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### Needing Advice by Leon L. Levy



Leon L. Levy

Hi there, it's a great pleasure for me to be invited to share some observations for this month's Levy Light. Recently, I was asked to look over the file of a long time client I had represented for over 20 years. Even though I'm in my retirement years, the client wanted my opinion regarding some term insurance he purchased many years ago. He is currently age 55 and purchased his life insurance when his family was very young.

I shared with him my current age of 88 and that I still come to my office to take care of my charities and emails. However, still active.

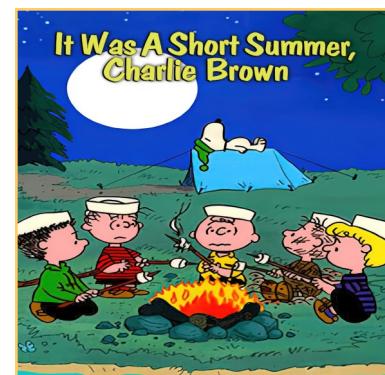
He came to me because he wanted my advice as to what I thought he should do about the expirations.

I said to him, "If I made it to age 88, then I EXPECT YOU WILL TOO!"

Although I am not sure what he will do, I nevertheless felt good about my advice to him, to think long term about his life insurance and not sacrifice quality to save a few dollars.

This is a reflective time of the year for me. I am thinking about others and how I have treated them, and if I have done or said anything hurtful or disrespectful to anyone this past year, please accept my deepest apologies. I aim high and thank you all for your kindness and friendship over these many, many, years.

-Ciao!!



### NAPA by Jason Lawrence



Jason Lawrence  
on the steps of  
the US Capitol.

In July, I attended the NAPA Fly-in Forum, which was in Washington DC. The purpose of the fly-in is to meet with government officials regarding new proposed retirement plan regulations and legislation. The first day was full of meetings with officials from the Department of Labor (DOL), the IRS, and the SEC, along with staffers from members in the House and Senate Finance committees.

The second day was spent in the House and Senate office buildings to discuss legislation. I met with the staffers of Senator Casey, Senator Fetterman and Representative Dwight Evans to discuss various legislative fixes that are needed in the SECURE Act 2.0 and to discuss how various other pieces of pending legislation could positively or negatively impact their constituents. It was a very rewarding experience to be a part of and a resource for some very influential people.



### Bar Harbor by Ryan Hogg



Ryan & Talia

My wife, Talia, and I took a trip to Bar Harbor, Maine in June to celebrate our one-year wedding anniversary. It was our first time in Maine, and we spent much of the trip exploring Acadia National Park. Highlights included hiking to the top of Cadillac Mountain and visiting Sand Beach along the coast of the island. We also enjoyed the town of Bar Harbor and ate plenty of great seafood. We felt fortunate to be able to visit such a picturesque place while celebrating our anniversary.

### Meet Wesley Wasserman



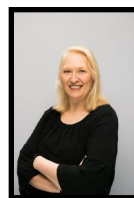
Wesley Wasserman

Greetings to all. I am new to the Levy Wealth Management Group. Before working here, I worked in Public Accounting as well as at a variety of publicly traded companies in their accounting departments. Joining the group has been a great experience for me so far.

I have always been interested in a career where I can help people achieve their goals. I believe that my prior experience in accounting will help benefit both the team and our many clients. I am enjoying getting to know everyone, collaborating on projects, and I am excited to meet all of you, our clients.

In my free time I enjoy spending time with my fiancé, Brigid, and also going down the shore. As summer winds down, I am looking forward to my favorite winter activity - skiing.

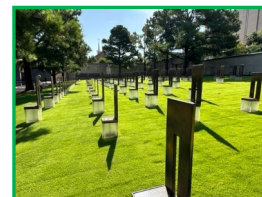
### Oklahoma City by Lisa Di Stefano



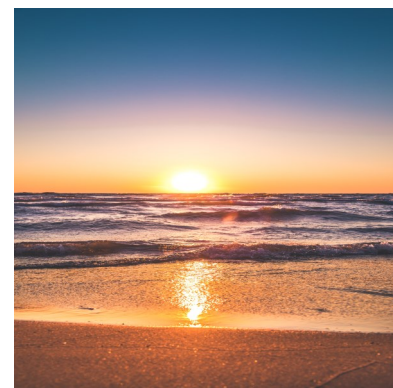
Lisa DiStefano

In early August, I visited a friend in Oklahoma City and she took me to the Alfred P. Murrah building memorial.

It was so beautiful, yet deeply emotional. There is a reflecting pool with bookend walls with the time right before the bombing at 9:01 and the end at 9:03. There is a memorial chair for each person killed. They also have something I have never seen at a memorial, a survivor's wall. They list all the names of those who escaped the tragedy. If you are ever in the area, it's a must see.



**Leon Fun Fact:** During most weekends in the summer, Leon spends time at the shore in Margate. He arrives usually on Saturday and leaves after breakfast on Sunday. When asked why he leaves so early he said, "Twenty four hours is just enough time at the shore. I like to get back to my place in town to get ready for the week ahead, and I don't like to rush."





### Ireland by Michele Tinsman

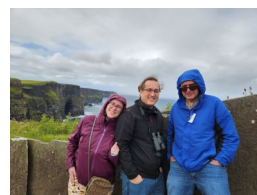


Michele and her children

In July, my family and I vacationed in Ireland. We were on a tour so our days began very early – breakfast by 7:00 AM and to the tour bus by 8:00 AM. Our guide strongly suggested packing appropriate rain gear every day as we would not be altering our schedule due to weather. After all, isn't Ireland known for having "forty shades of green?"



We visited many of the tourist highlights from Dublin to Galway. I passed on the opportunity to "Kiss the Blarney Stone" at Blarney Castle when I found out what was required of me. I'm not that limber. We stood in awe at the Cliffs of Moher, with the rugged coastline and crashing waves below, reminding us of nature's majestic power. In Waterford, we toured the famous Waterford Crystal Factory and learned of the city's rich Viking history.



Michele's daughter, son & husband

With its lush landscapes, rich history, and warm-hearted people, our trip turned out to be a perfect escape from the mundane routines of life. I cannot wait to return there!

### Interesting Message From a LWMG Client:

I wanted to share news that will add to your financial wellbeing. When recently renewing my AAA membership, I was informed by the representative that I had been a valued member for 35 years. She thanked me for our continued confidence and informed me that when we get to our 50th renewal, the ongoing charges would be waived. I am so pleased to hear this as I will be reaching my peak of driving prowess at that time, age 88. Stay healthy and financially secure.



### 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*

### Upcoming Birthdays:

Donna—October 14th  
Desiree—November 6th  
Josh - November 22nd  
Rex - December 15th

### Events:

Victor returned from LPL's Focus conference in San Diego  
Joe is attending the Excel conference in Nashville, TN.

### Milestones:

Jason—5 Year LWMG Anniversary



**Happy Fall**

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