Wealth Enhancement®

Levy-Clatterbuck-Robostello Team

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THE LCR LIGHT



Vision Statement:

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

Quote for this Edition

"May your summer be like the perfect lesson plan- engaging, enjoyable, and exactly what you need." - Anonymous



Happy Birthday, Dad

By Victor S. Levy, CLU, CFP®
Senior Vice President, Financial Advisor

About a week before my father, Leon Levy, turned 91, I shared some sad news with him – that I would not be here in Philadelphia with him on his birthday on May 6th. On that day, my family and I would be flying to California to attend a law school graduation for my middle son, Jonathan, and there was no way around it. I was afraid Dad would be upset, however, Dad's response, said with a smile – "Well it's more important I'm here on May 6th than you're here."

We laughed. In that simple lighthearted joke was a life lesson – **be grateful for your life**.

This caused me to pause and think about him, and to take a moment appreciate how lucky I am to have him as my father. But to know Dad is not to know a list of things about him like the schools he attended, or articles he has written, or the business that he built which gave me my start as a financial advisor.

Instead, I think of his accomplishments in terms of his qualities. The personality that makes him who he is, qualities developed over 91 years.

I wonder how many people Dad has helped protect by guiding them with life insurance or disability insurance? This was his primary job for most of those 91 years, and he helped protect many families.

Then, I think about the many people he has turned around and faced in elevators to say good morning. Or, the strangers he asked, "why aren't you smiling?" These exchanges were typically followed by laughter.

I think about the many letters he has written over the years to simply let people know he was thinking of them. I remember one letter with three words – **"Please call me."**

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Leon L. Levy & Victor Levy

I think about the many charities Dad has helped, the countless people who came to him over the years to express their need for help for their causes and the generosity he bestowed upon them and their organizations.

I think about his eight grandsons and how he has inspired them by simply being interested in their lives and being proud of their accomplishments. I see how they all look up to him.

I think about his three great-grandsons and how he lights up when he sees them running around his home.

Not least, I think about my mother, Fran Levy. His life partner and support who is there for him every day to push him, to guide him and to help him. I think about their many dinners together followed by countless concerts and shows at the Curtis Institute, the Academy of Music, or at the Kimmel Center.

Finally, when I think about my father, I can't help but think about his personal relationship with a higher power. It is a source of strength and determination that he carries with him every minute of his life.

Although I could not be with him on the day of his 91st birthday, I am fortunate to see him in the office whenever I am there. I am grateful for who he is, proud of his many accomplishments and appreciate that I have him in my life to show me what true leadership looks like.



My Trip to Italy *Domenic Hipple*

This summer I had the pleasure to travel to Italy with my family and my significant other, Allison. During this trip we explored cities and areas such as Milan, Florance, Tuscany, and Sulmona. It was such an enjoyment to be able to walk and explore ancient ruins as well as immerse myself in the culture and pace of the Italian people. While in Milan, the Inter Milan soccer team had won their league championship, and the city had erupted into a huge celebration that lasted early into the morning. It was a good precursor for the World Cup that followed in the past few weeks here in Philadelphia. My favorite part of the trip was visiting my family in Sulmona, the hometown where my Nonna is from. My family and I stayed 2 nights in the house my Nonna grew up in, and we were welcomed each morning by the farm life that lives in the area. The trip was an all-around joy and served as an important reminder to spend time with the ones you love.



Domenic Hipple's family



Jason with his daughters and Maverick

Family Update *Jason Lawrence*



It's been an exciting year for our family! Bree, age 12, is preparing to start middle school this fall after a successful softball season and an unforgettable four weeks at Camp Cayuga. Her younger sister, Ash, age 9, is heading to 4th grade and she stayed busy this spring playing both softball and soccer. Our faithful dog, Maverick, age 1, keeps us all busy and is still in his puppy phase.

This summer, Ash enjoyed spending time with friends, competing on the swim team, and participating in junior golf. We're proud of both kids for all they've accomplished and look forward to the adventures and opportunities the new school year will bring.



My Summer Internship *Dylan Elgart*

Hi, I'm Dylan. During my internship with the LCR team at Wealth Enhancement, I gained firsthand insight into the day-to-day work involved in providing clients with thoughtful financial guidance and personalized support.

I had the opportunity to sit in client meetings, which gave me a deeper understanding of how financial planning helps individuals and families prepare important life goals. I also worked with Mason on projects related to transferring assets to the next generation and enjoyed getting to know our team during our weekly Wonderful Wednesday lunches. I learned about the concerns many clients have regarding their own futures and the well-being of their children, as well as the strategies advisors use to help them achieve the best possible outcomes. I developed an appreciation for the responsibility that comes with guiding clients through decisions that can have a lasting impact on their lives and for the trust required to build and maintain strong relationships. This experience provided an excellent introduction to working with individuals from diverse backgrounds, taking initiative to support others, and collaborating as part of a team, skills I look forward to carrying into my career as a school psychologist after graduating from Lafayette College.



My Summer Internship *Mason Clatterbuck*

Hi, I'm Mason. My experience this summer was incredibly rewarding, and I have learned a great deal both about myself and the financial planning industry.

Throughout my internship, I have developed a greater appreciation for the importance of being thorough in my research, as every detail matters in this business. I have also learned the value of presenting myself professionally. In financial planning, the way you present yourself is critical because it demonstrates competence, professionalism, and a commitment to helping clients achieve their goals. Overall, this experience has broadened my perspective on the opportunities available within the industry and has given me a strong foundation for a successful career moving forward. I head back to West Chester University for my senior year with many wonderful memories and I so grateful to the LCR team.



Michele Tinsman



Michele Tinsman's Retirement *Michele Tinsman*

We recently celebrated a retirement in our office for Michele Tinsman. Michele has been part of our team for the last five years after starting her career as a client service associate with Vanguard Investments. She has always done her job well, carrying the weight of many of our complex transactions, supporting estate planning and being a coach to others who were learning the job. The work of the client service associate is so important as they are the team that "gets things done," both efficiently and without errors. Michele's attention to detail has always been a key strength of her effort and work. For our team, Michele raised the bar to the highest level in this part of our business, and she will be greatly missed. We were happy to celebrate her retirement with her recently with a delicious lunch at Pietro's followed by a retirement cake and some goodies. We will miss her greatly and wish her our very best for a long, healthy and meaningful retirement.

Living with Wildlife

Vicky Freece



People often ask why I love living where I do. The answer is simple: my backyard has better entertainment than most television shows!

My home in Harleysville backs up to a wooded area where I'm lucky enough to share my neighborhood with raccoons, possums, groundhogs, deer, and foxes. A creek behind the house is home to snapping turtles (which I learned the hard way, are appropriately named) and a chorus of bullfrogs that perform nightly concerts alongside the crickets. They never ask for applause!

One of my favorite regulars is a mother raccoon who proudly brings her babies by for a visit. They stop at the same time each night, for some apples, crackers, and marshmallows, and I get a front row seat to watch them explore the world. It's not hard to smile when a family of raccoons thinks your yard is worth putting on their itinerary.

Sometimes I consider moving to a bigger house. However, then the deer wander through, or a baby fox trots by, the bullfrogs begin their evening performance, or my masked little visitors show up looking for snacks, and I quickly remember why I'm still here. Living with wildlife isn't always convenient, but it's endlessly entertaining. I wouldn't trade these neighbors for anything!

Planning Retirement *Leon L. Levy*

You must consider a time that will come when funds you put away today will take care of you and your loved ones in the future, maybe even in retirement. It is wise to allocate a portion of your income into what I consider an investment philosophy, a space to put money away to grow and be used later in life. You should work with a financial advisor, who in turn can become your financial psychologist, one that understands your unique preferences to hold, invest, and make a profit. By maintaining a diverse portfolio, you can attain exactly what you need for your future. This is the pattern that I have experienced my entire life and have recommended to many clients and friends who ask advice about their future with natural fear of losses. In simple terms, do not be afraid to set aside money in your investment portfolio and have it managed well. It can be there for you tomorrow, no matter when and how far away tomorrow is for you.

"Do not be afraid to set aside money in your investment portfolio and have it managed well."



The LCR Team believes:

- Clients matter most
- Teamwork is essential
- Ongoing knowledge drives success
- In proactive actions
- In responding urgently
- Accuracy is critical

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