

Mazel Tov & Congratulations

Levinson Named Again as Top Wealth Manager

For the second year in a row, Peter Levinson has been recognized as one of Charlotte's best wealth management advisors. Both he and business partner Joanie Mashburn have been named as Five Star Wealth Managers by Charlotte magazine. Peter and Joanie lead The Levinson-Mashburn Group, a Merrill Lynch wealth management advisory team located in SouthPark.



Peter Levinson

On behalf of *Charlotte* magazine, Crescendo Business Services, an independent, Minnesota based research firm, surveyed over 46,000 high-net-worth residents in the Charlotte area to determine which wealth managers scored highest in client satisfaction. Those included on the final list represent less than 3% of the all wealth managers in the Charlotte area.

In 2007, Peter was named by the *Charlotte Business Journal* as one of Charlotte's top 20 wealth management advisors.

About Peter A. Levinson

Peter is First Vice President, Investments of Merrill Lynch Global Wealth Management. He is a Chartered Retirement Plan Specialist and has been addressing financial planning issues and providing investment consulting services to individual and institutional clients for 21 years. Peter received his undergraduate degree from Duke University and earned his Juris Doctor from the University of South Carolina School Of Law. He and his family are members of Temple Israel.

About Joanie Mashburn

Joanie is a Senior Financial Advisor with Merrill Lynch Global Wealth Management. She

is a Certified Financial Planner and is accredited by the National Center for Women and Retirement Research. Joanie has completed the requirements for the designation of Certified Investment Management Analyst (CIMA) which requires a rigorous course of study sponsored in conjunction with the University of Pennsylvania's Wharton School of Business.

About the Levinson-Mashburn Group

The Levinson-Mashburn Group is a team of Merrill Lynch professionals dedicated to providing wealth management advisory services and investment consulting strategies to individuals, corporations, endowments, foundations, pensions, retirement plans, and trusts.

About Merrill Lynch

Merrill Lynch is one of the world's leading wealth management, capital markets and advisory companies, with offices in 40 countries and territories and total client assets of approximately \$1.6 trillion. ☆

JEWISH FAMILY SERVICES
Holiday Reflections from Jewish Family Services

While the High Holidays and Days of Awe are still fresh in our minds, now is the time to reflect on the new understandings we've reached about ourselves and our relationships. Rosh Hashanah and Yom Kippur encourage introspection and remembrance. We examine our individual lives – how best to address our weaknesses and build on our strengths – in the context of a tradition that says change is a possibility and an opportunity. Judgment is tempered by forgiveness and atonement leads to renewal.

And so it is with Jewish Family Services. We constantly seek, especially at this time of year, to access relationships, identify opportunities and create the partnerships needed to meet the needs of our whole community. At JFS we will be forever committed to assisting those in our Jewish community who are in crisis and urgent need. We will be forever committed to reaching out to our seniors with programming, visits and a connection to their Jewish roots. But in addition, JFS is creating services and programs that

will embrace young families throughout our community, bringing resources to build stronger families in the belief that stronger families build stronger communities. With the expansion of our capacity to serve the children and adolescents of our community through the addition of a new child and adolescent therapist, our newly formed volunteer steering committee, and on-going collaborative projects with our partners in the Park such as Big Bubbe/Big Zayde bridging generations, a Reminiscence Workshop for caregivers, a tutoring program to give a helping hand to students in our day school, a poverty simulation to raise awareness of the hard work it is to be poor and our career counseling partnerships with the temples bringing our job support group participants one step closer to jobs, we do much more than help people cope with their losses and disappointments. We help make change possible by working to restore their hope, by increasing their number of real possibilities and by challenging them to make the most of what they have. Each

year we are inspired by the people we serve – the stories of people making extraordinary efforts, of small steps and giant leaps, of joining hands and changing lives.

Each name in our Friends Campaign donor list represents an even bigger story of caring and compassion; of personal investment in our community. Our donors' generosity adds immeasurably to our ability to help people recognize and build upon their strengths. We thank you for enabling us to fulfill our mission. Ours is a community effort. We cannot do it alone. If you have not already become a Friend of JFS, please consider making a contribution. It's not too late. You can mail your contribution to Jewish Family Services, 5007 Providence Road, Suite 105, Charlotte, NC 28226 or you may contribute online at www.jfscharlotte.org. Your gift to one strengthens many.

May Jewish Family Services, the people we serve, our friends and our community go from strength to strength throughout the coming year. ☆

Job Seekers Support Group

Sponsored by Temple Israel and Jewish Family Services, this group is open to all members of the Jewish Community.

If you are seeking employment, considering a job or career change, you are invited to join this dynamic and supportive group. Pick up tips for resumes, interviews, effective networking and meet new friends.

Meetings are the third Thursday of each month from 6-7:30 PM in the Board Room of Temple Israel.

Next meeting is October 16.

For more information, call JFS at 704-364-6594. ☆

Mitzvah Makers for August 2008

Jane Vatz Abel, Marnie Abramowitz, Lynne Cojac, Althea Cole, Beth Folic, Lisa Frucht, Gail Green, Mara Huber, Margie Hyde, Judy Kaufmann, Jenny Rosenthal, Lisa Shporer, Carol Speizman, Eleanor Turk, Jodi Valenstein.

JFS thanks the ladies from Hadassah who have cooked for us: Penny Krieger, Judy Kaufmann, Phyllis Korman, Ellie Bantit, Phyllis Berlin, Helene Cullen, Zelma Fink, Sheryl Mirman and Nancy Kerstein.

Mitzvah Baskets in honor of the Bar Mitzvah of Scott Lerner, Dylan Kaplan and the Bat Mitzvah of Caitelyn Totten.

Thank you to the following ladies who are always there when we need them, Tracy Brown, Suzy Catenazzo, Dana Ditesheim, Jennifer Lahn, Alison Lerner, Julie Lerner and Stacy Gorelick.

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Sandra Feldman, owner

NAWBO-Charlotte 2007 Business Owner of the Year