



Financial Advisors



Rick Levy

Financial Advisor

One to One Financial Advisors

3610 River Crossing Pkwy, Suite 280, Indianapolis, IN 46240

317-818-4673 | 1-800-667-5792

317-817-9934 (Fax)

RLevy@OnetoOneFA.com

www.OnetoOneFA.com

BUSINESS PHILOSOPHY

My goal is to provide families and business owners with assistance in building their financial freedom. I have the skills, knowledge and experience required to help meet my clients' established goals. My personal goal is to become a lifetime resource for each and every client.

PRODUCTS AND SERVICES

- Fixed and Variable Annuities
- Charitable Giving Strategies
- Disability Income Insurance
- Estate Conservation Strategies
- Education Funding Strategies
- Health Insurance
- IRA Consolidation/Rollovers
- Long-Term Care Insurance
- Mortgage Protection (through life insurance and disability income insurance)
- Lump Sum Pension Distribution
- Medicare Supplement Coverage
- Pension Payout Alternatives
- Pension Transfer/Rollovers
- Mutual Funds
- Tax Sheltered Annuities/403(b) Plans
- Term Insurance
- Universal Life Insurance
- Variable Universal Life Insurance
- Whole Life Insurance

QUALIFICATIONS

- Series 6, 63 and 65 Securities licenses
- Life, Health and Accident Licensed

PERSONAL

- Family: Married to wife, Mickey
- Sons: Scott and Danny
- Hobbies: Ice hockey, St. Louis Cardinals
- Education: Attended Meramec College

ORGANIZATIONS

- Former Certified Ice Hockey Referee with USA Hockey and the National Ice Hockey Officials Association for 19 years

Rick Levy is a registered representative of and offers securities and investment advisory services through MML Investors Services, LLC, Member SIPC (www.SIPC.org). Supervisory office 900 East 96th Street, Suite 300 Indianapolis, IN 46240 Phone (317)469-9999. One to One Advisors is not a subsidiary or affiliate of MML Investors Services, LLC or its affiliated companies. CRN201910-220238