

THE SUMMA GROUP

of Oppenheimer & Co. Inc.

Members of The Summa Group were asked to share some thoughts about what they've been most grateful for during the health crisis, as it relates to being a part of the team and what they've enjoyed doing that wasn't a part of their everyday routine during more normal times.

An inside look at the Summa Group during a time of crisis.

Brian Werdesheim

Managing Director-Investments



“ I am grateful for the peace of mind I have everyday knowing our team is united, committed and dedicated to doing what is necessary to keep our business viable and running efficiently during this period of crisis.

I have been enjoying my daily bike rides through the neighborhood and taking the time to appreciate the simplicity and beauty of it all. This 30-45 minute experience has become part of my effort to stay mentally and physically sharp.

Grant sitting behind an ironing board and with an iron in his hand instead of his baseball glove and bat is a stunning development, and one that we may never witness again. ”



Jeffrey Werdesheim

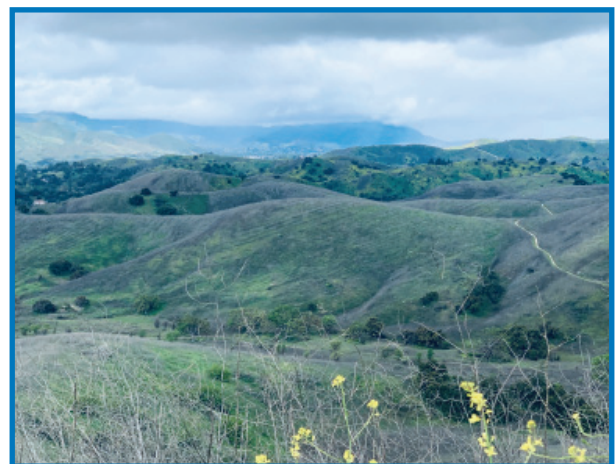
Managing Director-Investments



“ Given the current environment and level of stress in everyone's lives, it is extremely gratifying to see how our entire team is bonding and operating at peak efficiency levels.

What I have enjoyed doing that wasn't a part of my everyday routine prior to this health crisis...

Not having to shave every day is one for sure! And having more time to work out and mountain bike has been a blessing. ”



Robert Dalie, CFP®

Managing Director—Investments



“ I am grateful for every single member of the Summa Group, especially during these difficult and uncertain times. Although each one of you brings a unique skill set to work each day, the fact that we all share similar core values such as family, honesty, passion and commitment is a rare thing in business. I want everyone to know I’m grateful to be part of something so special and recognize how truly blessed we all are.

Before this crisis, I would spend hours driving kids around after work, basically running an Uber service. Now that all outside activities have come to a grinding halt, we’ve had more quality family time. Our family is big on traditions. One new tradition we’ve added includes family hikes in the early evening where we can watch the sunset, and here is a picture from one of those evenings.



Adam Quarello

Executive Director—Investments



“ Here is a picture of our seven year old, Arabella, holding Virabhadrasana II or commonly known as the Warrior II pose in yoga. For “recess” everyday I’ve been attempting to teach her some basic yoga poses. Our three-year old, Josephine, of course had to join in. In addition to our family walk on the Manhattan Beach and wood chips every afternoon before dinner, I’ve enjoyed “recess” as part of my new routine. Having this time with my family is irreplaceable.

I’m grateful for being part of the Summa Group even more during this crisis as it provides me confidence knowing that I have the support of a strong advisor bench and talented analysts. When there is so much disruption, it is easy to focus constantly on the negative. Being part of the Summa Group has helped filter out the negative noise and focus on what’s most important, our clients’ financial goals. ”



David A. Allen

Senior Financial Associate
Director—Investments



“ This is me spending quality time with my family and taking a fun group photo.

I am most grateful to be surrounded by teammates who are extremely thoughtful and resourceful, and being part of a group that is second to none.

We also are full of love and consider ourselves family. A big plus has been opening my door during market hours and joining my family for breakfast. ”



Gary Chiate

Executive Director—Investments



“ I joined the Summa Group on Sept 1st of last year. I have been in this business for 52 years and can honestly say that the last eight months since joining Summa have been the most enjoyable and professionally satisfying of my career.

The team effort by everyone and how we work together to accomplish our goals is incredible. It is fun working with this team and the assistants.

We are in our fourth week of working remotely and we haven't missed a beat. We have our team and research meetings on Monday via conference calls and everyone communicates on important matters all day. On Fridays we have a Zoom “cocktail party” which is really fun. Daniela is going to help me become more efficient on Zoom.

Every afternoon after the market closes, Peggy and I take a walk in the neighborhood and see things we haven't seen before.

We are all making the most out of very difficult times and hopefully this will come to an end soon. I am just happy to be part of this amazing group. ”



“Every afternoon after the market closes, Peggy and I take a walk in the neighborhood and see things we haven't seen before”

—Gary Chiate

Stan Yang, CAIA, CFA

Group Analytical Associate, Director



“ A picture of me with our garden tools— because of our gardener and Michelle, I almost never do yard work, but I thought I would give it a try.

I know I can reach out to anyone in Summa family at any time for whatever reason and get back timely and genuine responses —that's what I'm grateful for.

I taught myself to play a guitar at one point in the past. It has been a while since I've picked up my guitar and I've recently started practicing again (still not very good but trying). ”



“I know I can reach out to anyone in the Summa family at any time for whatever reason and get back timely and genuine responses.”

—Stan Yang

Valerie Yang, CFP®

Senior Analytics Associate



“ I am so grateful that I still have a secure job and a home. Most importantly, I am grateful for my supportive family and friends.

Summa Group is like my family, we are more connected during this pandemic than ever.

I am enjoying the flexibility of working at home. I can actually take time and enjoy my breakfast in the morning in my living room with sunshine hitting at the dining table. These are the beautiful moments that were not part of my routine before.

Also, when there are stressful moments (market down another 500 points or another piece of bad news), I go to my piano, jam (right word? haha) a piece of Chopin, and feel really good and relieved afterwards. ”



Daniela Greene

Senior Client Service Associate



“ My 15 year old daughter Swiffering the floor on her own, without being asked, because she was bored.

I am most grateful for the support of the Summa team in making sure we are all comfortable and able to work at home so we can stay safe and healthy with our family. With the three of us ladies working from home, our client support hasn't skipped a beat which shows how dedicated we all are and I am so proud to be a part of this team!

I have enjoyed looking at my personal calendar each day and it's empty! With that, it has allowed us to play games, go outdoors and enjoying our two teenage girls more than ever! ”



“I have enjoyed looking at my personal calendar each day and it's empty!”

—Daniela Greene

“Having a team that supports each other – collectively and individually – through a time like this has shown me how valuable our bond is.”

—Savannah Pincus



Savannah Pincus

Group Analytics Associate

“ I took this picture on one of our daily walks around the neighborhood down here in La Jolla, where I am temporarily residing with my boyfriend Bobby. Surprisingly, we’ve been spending more time outside (6 feet from passersby!) than usual. The fresh air definitely breaks up the monotony.

During this strange new normal that we are experiencing, there are plenty of reasons to be fearful and anxious. Having a team that supports each other – collectively and individually – through a time like this has shown me how invaluable our bond is. One less thing to worry about, in my book.

My favorite part of my new routine is working in sweats and hoodies every day, by far. Other than that, I’m enjoying make-shift garage workouts and card games – lots of card games. ”



Engrid Mirzaie

Senior Client Service Associate



“ Mourning Doves have built a nest outside of my kitchen window. Here they are checking in on their babies. A feeling of calmness came over me while watching them.

During this time in our lives, it would have been a very lonely journey to not have been part of a team. Truly grateful for my work family.

What I have enjoyed doing that wasn’t a part of my everyday routine prior to this health crisis... 1,000 piece puzzle! It’s a slow process, working on it every night. ”



Andrea Kuehnert

Client Service Associate



“ My twins celebrated their 8th birthday in quarantine and we had a family piñata. The other picture is kinda gross, but my girls went on a bug hunt.

I am grateful for the camaraderie of our team and the group texts/Friday happy hour and no need to commute in Los Angeles traffic. ”

