



Berkshire

DIVIDEND STRATEGY

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"Casual Friday" Commentary

Casual Friday: Dog Days Of Summer - "Rev-Up" Or "Kick Back?" – August 11th, 2017

Good Morning,

In August, business slows down and vacations heat up...

Some of our partners use this time to relax and rediscover work/life balance.

Others use this quiet time to revitalize business initiatives.

Can You Combine Both?

A few advisors we know are getting serious traction by hosting wealth/health/wellness events for clients - rather than presenting the same ol' market update.

These events allow you to be the catalyst for client lifestyle goal achievement - not just investment goal achievement.

Choose a luxurious setting (health club, restaurant, golf club) and source local experts (fitness/life coaches, psychologists, golf/tennis/cycling pros, chefs) to promote wellness initiatives and social interaction. Introduce the program by mentioning how you care not only about their finances, but support their overall well-being and hobbies. Let the speaker give their talk, and upon its conclusion you can mix and socialize.

Multiple ideas can work for the format:

- Business Executives – Often stressed and challenged with work life balance – Hire an executive life coach to discuss topics of stress management, life balance and other common issues for executive level professionals.
- Retirees – Health and Wellness – Bring in a psychologist to discuss the importance of brain fitness in retirement years.
- Millennials – Experience seekers – Hire a travel specialist to discuss “undiscovered” vacations followed by a quick discussion around how to balance budget your life and leisure
- Hobbies and Pursuits – Sponsor a golf, cycling, fitness, or cooking clinic with clients with shared passions

More Ideas - "Reving Up":

- Summer Read: [Unselling – Sell Less to Win More](#) by Peter Bourke.
 - A quick readable book designed for folks who handle complex sales. It will teach you a fresh set of probing discovery discussions (and responses) that unlock true client motivation and inspire action.
- Berkshire's “Eight Common Threads of Elite Investment Advisors”
 - Contains a combination of strategy and tactics to elevate/differentiate your practice in an increasingly passive/robo dominated world
 - Call us for access to the report and to discuss how it can reshape your practice

More Ideas - "Kicking Back":

- Summer Food Recipes: Hosting an outdoor party? - [Country Living Summer Dinner Recipes](#)
- Summer Play List “Nostalgia”: Billboard lists the top 10 songs of every summer for the past 60 Years! - [Billboard Top 10 Tunes of Each Summer](#)
- Seeking Serenity?: Some of the best meditation apps available today! - [HealthLine Meditation Apps 2017](#)

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Dividend Highlights

- Dividend growth can often provide transparent insight into a company's fundamentals and vitality.
- Dividend growth can provide an attractive stream of increasing cash flow to satisfy many financial objectives.

In case you missed: Berkshire's Virtual Mid-Year Update
[Berkshire Mid-Year Advisor Supplemental 6.30.17](#)

- Quick firm/process review: Minutes 1-3
- Portfolio attribution/stock talk: Minutes 3-10
- Macro backdrop/outlook: Minutes 10-22
- Actionable practice management ideas Minutes 22-24

Regards,
-Gerry

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