



Berkshire

DIVIDEND STRATEGY

Gerard Mihalick, CFA
gmihalick@berkshiream.com

46 Public Square
Wilkes-Barre, PA 18701

570.825.2600

"Casual Friday" Commentary

Early Casual Friday: Actively Managing Your Thanksgiving - November 21st, 2017

We are thankful for our great relationships with advisors!

"TPS" - Thanksgiving Policy Statement

An effective Investment Policy Statement (IPS) is all about matching client objectives with the right investment strategies.

Your "TPS" should do the same! Whatever your Thanksgiving Objectives - Here is a diversified lineup of strategies to save time and maximize results. Even your compliance department approves!

Core: It all starts with some great time savers, and of course getting the turkey right. Like dividend strategies, turkeys don't need to be bland or dull.

<http://www.businessinsider.com/thanksgiving-meal-tips-and-tricks-2014-11>

Index: Why enjoy only one region's cuisine, when you can enjoy them all? Here are some great sample dishes and entire menus from 7 distinct areas of the United States.

<http://www.epicurious.com/archive/holidays/thanksgiving/american-regional>

Specialty/Sector: If there was one asset class everyone can usually agree on its....bacon!

<http://www.epicurious.com/recipes-menus/bacon-lovers-thanksgiving-recipes-menu>

"Liquid" Alts: Your Thanksgiving wine questions...answered.

<http://www.bloomberg.com/news/articles/2015-11-23/what-wine-to-serve-on-thanksgiving-a-critic-has-the-answers>

Global Macro: Foreign dishes to compliment your American plate

<http://www.pbs.org/food/features/five-recipes-for-an-around-the-world-thanksgiving/>

Alternatives: Had it with turkey all these years? Here are some options.

<http://www.businessinsider.com/thanksgiving-entree-alternatives-to-turkey-2015-11>

Derivative/Calorie Default Swaps: Looking to slim down this year? Here are some lower calorie alternatives.

https://blog.myfitnesspal.com/9-thanksgiving-food-swaps-to-save-calories/?utm_source=mfp&utm_medium=Facebook

Go on Margin: Looking to eat as much as humanly possible? Here are tips from competitive eaters. Hint: clothing really does matter.

<http://www.thekitchn.com/this-is-how-to-prepare-your-stomach-for-thanksgiving-according-to-a-competitive-eater-225841>

Allocation "Pie" Bonus:

<http://www.vanillaqueen.com/pie-hacks-super-results/>

Contact Berkshire:

Gerard Mihalick, CFA, Portfolio Manager, gmihalick@berkshiream.com or (570) 825-2600
Jason Reilly, CFP®, VP Advisor Distribution, jason@berkshiream.com or (570) 825-2600

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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.

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Definitions: The S & P 500 Index is a market capitalization weighted index of the largest 500 U.S. stocks. It is a market-value weighted index (stock price times # of shares outstanding), with each stock's weight in the index proportionate to its market value. The index is designed to measure changes in the economy and is representative of most major industries. Russell 1000 Growth Index measures the performance of those Russell 1000 companies with higher price-to-book ratios and higher forecasted growth values. The index was developed with a base value of 200 as of August 31, 1992. Russell 1000 Value Index measures the performance of those Russell 1000 companies with lower price-to-book ratios and lower forecasted growth values. The index was developed with a base value of 200 as of August 31, 1992. You cannot invest directly in an index. BEst (Bloomberg Estimates) Earnings Per Share (EPS Adjusted) estimate returns Earnings Per Share from Continuing Operations, which may exclude the effects of one-time and extraordinary gains/losses. Beta is a measure of volatility vs. an index. Upside/Downside capture ratios refer to a portfolios performance as a percentage of either positive returns (upside) or negative returns (downside) vs. an index. Standard Deviation is a measure of total risk. Alpha, Beta and capture ratios are represented as calculated by Morningstar.

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**Platform restrictions may apply. Preliminary returns are based on composite estimates only. Individual accounts will vary.*