Can A Fresh Approach To Dividend Growth Transform Your Practice - For The Better?

Berkshire
DIVIDEND STRATEGY

NEW PRACTICE MANAGEMENT PROGRAM
AVAILABLE FOR ADVISORS, REGIONAL/BRANCH MANAGERS, AND WEALTH MANAGEMENT EXECUTIVES.

Does this sound familiar?

- Tracking dozens of different investment strategies is a daily headache.
- Every blip of market volatility sends your clients into a tailspin.
- Your clients are constantly asking about costs and performance.

AVAILABLE FORMATS INCLUDE

In-branch presentations

Regional conferences

Conference calls

One-on-one consultation

Imagine a fresh investment management practice model that delivered:

- Fewer investment strategies to manage.
- A new blueprint for success that is disconnected from daily market swings.
- More time to devote to client planning and client service.
- Enjoyable working relationships with a smaller, more profitable customer base.

Building Your Alpha Practice

Berkshire calls this transformation *trading in your Beta Practice for an Alpha Practice*, and it offers many benefits to advisors and their clients:

Better focus. When cash flow demands are met, clients remain on track with their goals *regardless of what the market is doing day to day.*

No more macro drama. A cash-flow focused model creates higher probability outcomes and takes macro analysis, market timing and sector rotation off the table – for good.

Fewer investment strategies. You can streamline your practice and devote more time to client service and business growth.

Better conversations. No more downbeat dialogue focusing on “why is my account down?” Instead, you’ll engage clients with upbeat talks on keeping their plan on track.

Dividend Growth: Fueling Alpha Practice Performance

At Berkshire, Alpha Practices and forward-looking dividend management go hand in hand. We believe a diversified portfolio of high-quality companies that consistently increase their dividends can lead to attractive long-term investment results.

And when clients maintain focus on the many financial objectives achieved by dividend growth (instead of fluctuations in market value) significant practice synergies emerge for the advisor.

That's why at Berkshire, we've built a forward-looking, bottom-up selection process that emphasizes the true long term value of companies and their ability to grow dividends.

Our edge is simple and straightforward. We have the patience, discipline and the ability to capitalize on the short sightedness of Wall Street.

Find out for yourself – a clean break to a new and improved practice is only one conversation away.

- Achieve a blend of high current income and growth in cash flow over time.
- Achieve capital appreciation in underlying holdings through superior stock selection.
- Dampen volatility in uncertain market environments.
- Avoid stocks with high correlation to fixed income.
- Through quality and transparency, help clients to understand/appreciate what they own.

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WHY PARTNER WITH BERKSHIRE?

Advisors like Berkshire because we know your business as well as you do.

Dedicated practice management support to elevate your advisory practice.

- **Strategic insight as you transition to your 'Alpha Practice'**
- **Talking points and assistance with presentation material**
- **Direct help with new business**
- **Client events**

On-going Portfolio Manager access to offer insight and answer questions especially during times of volatility.

- **Weekly Portfolio Manager email**
- **Client conference calls**
- **Dividend increase announcements**