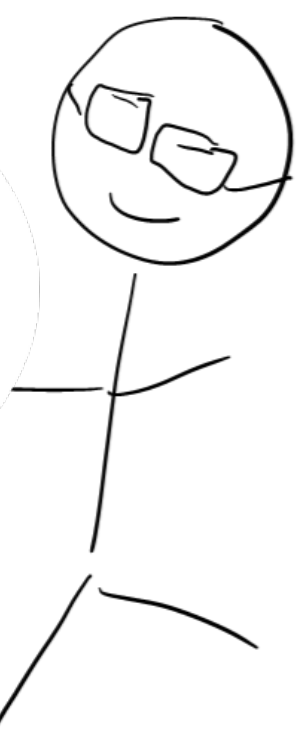


Berkshire Dividend Growth Strategy

The Reality of Today's Market Place?



My firm offers great investments and I do financial plans for my clients!



Check out our performance!
Here's some golf balls!

Investments are not FDIC-insured, nor are they deposits of or guaranteed by a bank or any other entity, so they may lose value. Investors should carefully consider investment objectives, risks, charges and expenses. Additional information can be obtained from a financial professional and should be read carefully before investing. Dividends and yields represent past performance, there is no assurance they will continue to be paid in the future. Platform restrictions may apply.

Berkshire Dividend Growth Strategy

The Reality of Today's Market Place?



- 457 ETFs were launched in 2021 alone
- \$84 Trillion in wealth will transfer in the upcoming decades (Cerulli 2022)
- Roughly 88% of heirs fire their parent's advisor (SS&C 2022)
- 75% of US Millennials surveyed have a professional financial advisor – a higher percentage than either Generation X (67%) or Baby Boomers (70%) (Natixis 2022)
- INTRESTINGLY, Roughly 50% Millennials don't trust algorithms or artificial intelligence to make investment decisions (Natixis 2022)
 - 92% say they trust their financial advisor (Natixis 2022)

Sources: [Natixis](#), [Cerulli](#), [SS&C](#), [Statista](#)

Berkshire Dividend Growth Strategy

The Reality of Today's Market Place?



“Old Playbooks” may Include:

- Investments all over the place not aligned with client objectives
- Sub-par standardization in client allocations across the book of business
- Generic marketing messages, no niche or specialty
- Keeping clients who don't take your advice, and take up way too much time
- Spending too much time and non-value add items
- Constantly focusing on market direction and benchmarks vs actual client objectives
- Not adopting new technologies

Berkshire Dividend Growth Strategy

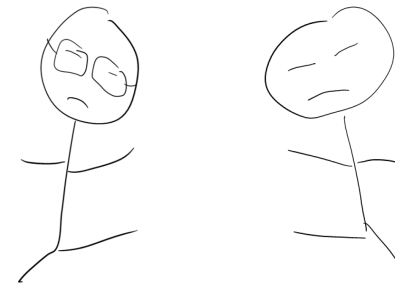
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The Reality of Today's Market Place?



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Berkshire Dividend Growth Strategy

The Reality of Today's Market Place?



Please, please, please tell us how to do it already!

OK – Here we go...

Berkshire Dividend Growth Strategy

Berkshire's Key Implementation Pillars



- Align with a “Partner” vs a “Provider”
- Align Investments With Client Financial Plans
- Align With A Common Sense Approach To Investing

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Berkshire Dividend Growth Strategy

Align With A “Partner” vs A “Provider”



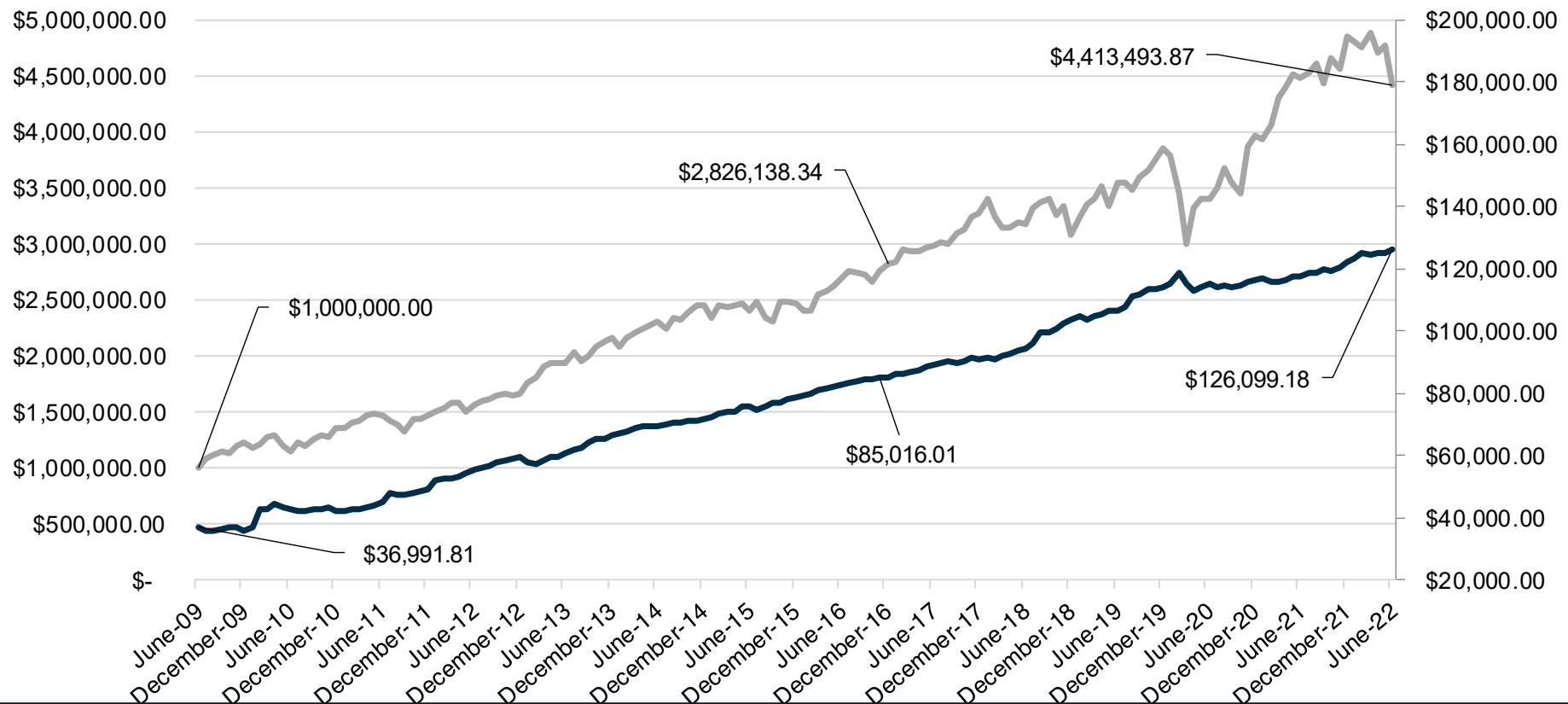
- On-going Portfolio Manager access
- Weekly Portfolio Manager email “Casual Friday”
- Client conference calls
- Dividend increase announcements
- Direct help with new business
- Dedicated practice management support to elevate your advisory practice

The Real Reason Low Cost Options are Winning?	“How to Fill in the Client Perception Gaps”
Practice Growth During Social Distancing	“To Zoom or Not To Zoom?”
Why Do Investors Keep Making the Same Emotional Mistakes?	"Predictably Irrational" but it's not their fault...
Streamline Your Offering vs. “Death By a Thousand Tickers?”	“Investment Inventory Management Playbook”
Client Discussions When Markets Hit All-Time Highs	“Advisor Checklist For All Time Highs”
Dividend Stock in a Rising Rate Environment?	“Rates And Dividends?”
Solve Big Problems, Get Big Assets?	“Beyond Investment Acumen”
Articulating Your Move From Stock Picker to Wealth Planner	“Transitioning a Practice to Outside Managers”
Unleashing Practice Efficiencies - Unified Managed Accts (UMA)	“UMA Crusader”
The Only Benchmark That Matters? A Comprehensive Guide to Income Based Investing	“Berkshire’s Comprehensive Guide to Income Investing”

Berkshire Dividend Growth Strategy Align Investments With Client Financial Plans



Inception (6.30.2009) through 6.30.2022 -- Net of 1% Annual Fee



Financial plans and investments fully aligned.

Berkshire Dividend Growth Strategy

Align With A Common Sense Approach To Investing



Black boxes? Four factor alpha models? Algorithms? "No thanks."

Instead, Berkshire offers a more common sense, forward looking investment process:

- Evaluate companies like a business owner
- Model out future cash flows that can result in dividend growth
- Buy high-quality, value based, strong cash flow companies
- Own 30-40 "multi-generational" type companies your clients will understand

Berkshire Dividend Growth Strategy

Performance vs. Russell 1000 Value – 6.30.2022



	Berkshire Dividend Strategy (Gross)*	Russell 1000 Value Return	Berkshire - Russell 1000 Value Difference	Berkshire Dividend Strategy (Net)*
2009 Inception 6/30/2009	23.24%	23.18%	0.06%	22.74%
2010	11.62%	15.50%	-3.88%	10.62%
2011	10.04%	0.39%	9.66%	9.04%
2012	14.18%	17.51%	-3.33%	13.18%
2013	31.26%	32.56%	-1.31%	30.26%
2014	13.88%	13.45%	0.43%	12.88%
2015	2.27%	-3.84%	6.11%	1.27%
2016	15.29%	17.33%	-2.03%	14.29%
2017	16.95%	13.64%	3.30%	15.95%
2018	-5.15%	-8.28%	3.12%	-6.15%
2019	26.78%	26.52%	0.26%	25.78%
2020	4.01%	2.78%	1.23%	3.01%
2021	23.52%	25.12%	-1.60%	22.52%
2022 YTD	-8.67%	-12.87%	4.20%	-9.17%
Cumulative Return	402.65%	320.81%	81.84%	347.43%
Annualized	13.23%	11.69%	1.54%	12.22%
1 Year	-0.40%	-6.86%	6.45%	-1.40%
3 Years	8.69%	6.83%	1.85%	7.69%
5 Years	9.18%	7.14%	2.04%	8.18%
7 Years	10.13%	7.67%	2.46%	9.13%
10 Years	11.99%	10.49%	1.51%	10.99%

*Performance measured from inception (6.30.2009). Investments are not FDIC-insured, nor are they deposits of or guaranteed by a bank or any other entity, so they may lose value. Investors should carefully consider investment objectives, risks, charges and expenses. Additional information can be obtained from a financial professional and should be read carefully before investing. Dividends and yields represent past performance, there is no assurance they will continue to be paid in the future. Platform restrictions may apply.

Berkshire Dividend Growth Strategy

The Reality of Today's Market Place?



Where do we go
from here?

“Benefit from an elevated perspective.”



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Berkshire Dividend Growth Strategy

Disclosure Information



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