



Berkshire

DIVIDEND STRATEGY

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“Casual Friday” Commentary

Casual Friday: Investor Amnesia? + We Need Your Help – September 29th, 2023

#TGICasualFriday!

3Q Commentary:

By popular request, here is a link to guide clients through a range of topics such as: growth stocks, AI, Berkshire return series and reviewing investment mandates:

[Berkshire 3Q 2023 Commentary](#)

Switching it Up!

The last few weeks we presented the Blue Ocean Advisor Series.

Suffice to say we shared a lot of *our* advice.

Now we are asking for yours.

Could you email / call us with some feedback?

Question 1: How would you describe how clients are reacting to the current investment climate?

How are you responding/allocating?

Question 2: What practice management topics would you like to hear more about?

Examples: Team issues, UMA/technology, narrowing your book, outsourcing, lending etc?

What topics resonate?

All responses confidential.

The cool and inspiring story of Mike McDaniel, coach of the Miami Dolphins:

[“I’m chasing the best version of myself”](#)

We hope this video inspires you to be the financial advisor you always wanted to be.

Let us know how we can help you achieve that!

Thanks have a great weekend!

Gerard

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