



Berkshire

DIVIDEND STRATEGY

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Practice Management Concepts

“We Don’t Just Sell a Dividend Product...”

Yes, you might not be looking for a dividend product right now. -- Perfect! We’re not trying to sell one.

...Well, maybe that’s not entirely true. We do offer a dividend strategy, and we believe it to be quite effective for a host of reasons. We’d be happy to share our differentiated investment process, sustainable edge, and our solid numbers. And yes, we are passionate about our creativity, depth of team, and the client benefits. We also realize that’s not enough to set us apart. Advisors rarely wake up in the morning and ask, “how on earth am I going to find a decent dividend strategy?” You likely have a huge list of vetted asset managers -- all worthy of being on your firm's roster.

To be fair, plenty of advisors have hired us based on a mandate/factsheet basis (and we love it when advisors are drawn directly to the strategy!). But there are multiple ways to differentiate a strategy... Chances are you have many practice aspirations and challenges that need solving. The way we market and deliver our dividend strategy is a major differentiator for our many advisor partners. We present our firm, strategy, and service through the lenses of the practice objectives we help solve.

What does this look like in practice?

Advisor Challenge	Berkshire Potential Solution
“I have too many CUSIPS and need to discuss consolidation.”	Positioned correctly, our dividend portfolio can cover a lot of client allocation needs
“I need to consolidate strategies or change my selling model, but I’m worried about capital gains taxes.”	We’ve developed a customized transition approach that manages capital gains and can potentially drive down tax costs.
“I’m too busy and would like to outsource more but I’m getting pushback from clients.”	We can help you make the case through webinars, and presentation decks. And we’re ready to show up via in-person meetings too.
“My clients are hesitant to make changes and don’t want to feel cast off to some impersonal firm”	Our high-touch approach includes direct calls with clients and broad portfolio manager access, keeping them comfortable and you relevant.

<p>“I’d like to grow my practice but don’t have enough time to do it right.”</p>	<p>We provide direct practice management webinars, provide teachings that promote best practices and strategies to grow your business.</p>
<p>“I need to find new ways to engage my clients.”</p>	<p>Berkshire weekly emails forego the boring finance speak and provide sharp takes on important, big picture trends. They can serve as a foundation to your own communications.</p>
<p>“I’m tired of chasing the benchmark and being victim to the ups and downs of the market.”</p>	<p>We can help you articulate the case for income-based strategies and how they may immunize cash flow needs and get client eyes off every market gyration.</p>
<p>“I’m tired of the old platforms of separate platforms for everything – SMA/mutual fund/advisor directed...it’s all cumbersome”</p>	<p>Let us show you how to build an assembly line using UMA technology.</p>

So, for us, it’s not the strategy per se, it’s the different ways it can be positioned to solve real practice and client problems.

It’s not too dissimilar to an advisor’s business. There are lots of financial advisors out there like you, and most have access to the same tools and information. But you (hopefully) have a unique way you package those tools into an offering that solves a whole host of aspirations and challenges for your clients. That’s what makes them work with you vs. someone else. Advisors see the same spirit in the Berkshire model, and it’s why some advisors make us their partner of choice.

Our real value is how our service is delivered and customized to your specific practice objectives. So, while you might not be looking for a dividend “product,” if you have any one of the above challenges, we invite you to have a discussion with us on how we can actually help. What challenge can our service and our portfolio potentially help you solve? We know that when we meet those challenges, suddenly the case to move assets our way becomes compelling.

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