Berkshire
DIVIDEND STRATEGY

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Practice Management Concepts

Berkshire 10 Ideal Advisor Engagements

1. I'm transitioning from advisor-directed accounts to managed accounts."
2. "I am buying a book(s) of business."
3. "My partner is retiring."
4. "I need strategic advice building my team."
5. "I need to streamline the # of investments in my practice."
6. "I just changed firms."
7. "I want to narrow my client list and create a niche."
8. "I'm tired of being a victim to the ups and downs of the market and want to focus on income-based strategies."
9. "I want to accelerate growth and align with partners who support my growth."
10. "I need to change managers but I'm worried about capital gains." (Tax Alpha)

Contact Berkshire to learn practical solutions to these common engagements!

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