



Berkshire

DIVIDEND STRATEGY

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“Casual Friday” Commentary

Happy 10th Birthday Casual Friday! – May 17th, 2024

#TGICasualFriday!

This month Casual Friday celebrates its 10th birthday!

Originally called “Five Point Friday” my original goals:

- Create weekly engagement with advisors that was “different, better, more useful and MORE FUN” than the boring stuff a lot of PM’s usually write about
- Use my liberal arts background to create a latticework of thought-provoking non-financial (and fun) content
- Help an advisor get to know the people and culture behind the Berkshire Dividend Strategy
- *Be a source of inspiration for advisors to be the absolute best they can be in every part of life*

Reflections?

We’ve been through a lot together – crisis after crisis, panics, recessions, wars, pandemics you name it! We’ve tried to walk with you every step of the way so we can grow, learn and thrive together.

But through all these crazy machinations that dominate the investment world – heck the world, we believe the strategy has endured. And that really is the point of Casual Friday - to highlight the longevity and foundational nature of dividend investing and give advisors the tools to keep clients “in it.”

Week in, week out, Casual Friday is a labor of love for sure.

To Keep Casual Friday “fresh” we need your feedback:

- What topics inspire you the most/would you like to see MORE of?
- What topics DON’T we cover but should?
- What formats beyond email do you think make sense?
 - A weekly live call with industry and lifestyle guests?
 - A weekly pre-recorded webinar?

I’m grateful to my team, especially Jason Reilly. He’s a critical part of everything we do at Berkshire and a constant source of input for Casual Friday. And

I’m grateful for all of you.

Thank you for an amazing ten years!
See you next week – promise.

Here's a link to the first one - [The First Casual Friday](#)
Does anyone remember?

Have a great weekend!
Gerry

[Click here to schedule a phone call or virtual meeting](#)

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