



Berkshire

DIVIDEND STRATEGY

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“Casual Friday” Commentary

Casual Friday: Happy 15th Birthday Berkshire Dividend Strategy! – June 28th, 2024

#TGICasualFriday!

June 30, 2024 marks the 15th birthday of Berkshire Dividend Strategy’s inception and track record! In a world of “short-term,” we’d like to focus on the word: “Longevity.”

- Our team
- The process
- The companies we buy

But most of all we appreciate the longevity of our relationship with you. Many of you entrusted hard-won client dollars for well over a decade – early adopters. The strategy and Berkshire itself would not be the same without all of you.

Thank you!

But we will keep aiming higher. Please share any success stories, perspectives, and how we can make the next 15 years even better for the portfolio and your practice.

In the coming weeks, expect some company insights centered around “longevity” and special recognition for early advisor/adopters of our strategy.

Here's to the "next 15!"

Gerry

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