



Casual Friday: Summer Vibes – August 23rd, 2024

#TGICasualFriday!

Big changes hit the PUMA platform last month... Berkshire Dividend Strategy is now 25bps manager fee. Can you share feedback on the impact to your business? Are the changes... Creating a more competitive offering? Encouraging more managed money? Facilitating account consolidation? Any feedback is helpful!

All About End of Summer!

With summer coming to an end, we're going to "punt" (yes end of summer marks the start of football) on investment commentary. Instead, we're highlighting the "Casual" of Casual Friday!

Travel hacks on a last-minute vacation? You earned it -- Client demands, navigating tricky markets, keeping up with compliance... It's a rewarding but also a challenging business. Here's a quick Forbes guide on [How To Save The Most On A Last-Minute Summer Vacation](#)

Sticking Around the House for a BBQ? As an aspiring southerner, I dote over the BBQ Showdown on Netflix! Here are [20 Of The Best Recipes To Make This Summer](#) that pair well with any style BBQ! Wash to BBQ down with an old fashioned ☺ [The 7 Best Bourbons for Old Fashioneds, According to Bartenders](#)

Late Summer Time Reads?

"The Infinite Game" by Simon Sinek (2019) -- Why? Encourages leaders to focus on long-term vision rather than short-term wins, fostering a mindset of sustainable growth.

"Deep Work: Rules for Focused Success in a Distracted World" by Cal Newport (2016) -- Why? This book emphasizes the importance of deep, focused work for achieving mastery in any area, including process improvement.

"Essentialism: The Disciplined Pursuit of Less" by Greg McKeown (2014) -- Why? Encourages business leaders to focus on what truly matters, cutting out the noise to refine and perfect their processes.

Speaking of football... Private equity is coming for the NFL: Here's who's making a play for a piece of the action: <https://fortune.com/2024/08/22/nfl-private-equity-investment-rule-change-vote-carlyle-blackstone-arctos-ares/>

Sneak in a little business talk in over the weekend? Jackson Hole is underway. The Federal Reserve Bank of Kansas City hosts the U.S. Superbowl of economic symposiums. [Learn about the Federal Reserve Bank of Kansas City's Economic Policy Symposium in Jackson Hole, Wyo.](#)

Have a great weekend!

Gerry

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