Berkshire
DIVIDEND STRATEGY

Berkshire Asset Management
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Practice Management Concepts

BRANCH EVENT Unified Managed Accounts: Are You Ready To Capitalize?

Date:

Time:

Speakers: Gerard Mihalick, CFA/ Portfolio Manager Berkshire Dividend Strategy

Location:

RSVP: Connor Smith csmith@berkshiream.com; 570.825.2600

Rationale: Sweeping changes may make it easier and more profitable to utilize UMA. Gerard Mihalick, CFA Portfolio Manager Berkshire Dividend Strategy will seek to educate and inspire advisors to capitalize on this immense opportunity.

Agenda

1. UMA Crusader: Is Wealth Management's Killer App Ready For Mass Adoption?
2. How To Transition Your Practice To Outside Managers
3. Advisor Growth Strategies For the Next Decade

Who Should Attend

- Advisors who seek to refine and sharpen their managed account offering
- Advisors in transition: switching from advisor directed accounts, acquiring books, building teams, need to consolidate investment offerings
- Advisors who seek investment partners who provide quality investment strategies, but seek strategic growth partners

Why Attend? Gerard Mihalick, CFA, Portfolio Manager Partner of Berkshire's Dividend Strategy brings over 30 years investment / portfolio management experience, but also has a long history helping advisors grow their practice. Far from the same old product pitch or nerdy PM droning on and on, Gerard looks to provide strategic, practical and tactical advice to help your advisors take their practice to the next level.

About Berkshire Dividend Strategy Available on PUMA, Private Advisor Network

1. Strategy: quality, enduring dividend growth (30 – 40 holdings in SMA format)
2. Service: a Portfolio Manager "on-call" to help make the case for dividend strategies and enhance client communication
3. Practice Management Expertise: A partner to take your practice to the next level

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Berkshire Asset Management, LLC claims compliance with the Global Investment Performance Standards (GIPS®). Berkshire Asset Management is a fee-based, SEC registered advisory firm serving the portfolio management needs of institutional and high-net worth clients. The Dividend Growth Composite contains portfolios invested in Berkshire's Dividend Growth Strategy with an equity allocation target of 90% - 100%. The Dividend Growth Strategy's primary objective is to generate a growing stream of equity income by investing in a diversified portfolio of equities with stable, high, and growing dividends. The benchmark is the S&P 500 Index. The index returns are provided to represent the investment environment existing during the time periods shown. For comparison purposes, the index is fully invested, does not include any trading costs, management fees, or other costs, and the reinvestment of dividends and other distributions is assumed. An investor cannot invest directly in an index. Gross returns are presented before management and other fees but after all trading expenses. Net returns are calculated by deducting actual management fees from gross returns. Returns reflect the reinvestment of dividends and other earnings. Valuations are computed and performance is reported in U.S. dollars. To receive a complete list of composite descriptions and/or a compliant presentation, contact Jason Reilly, CFP® Tel: 570-825-2600 or info@berkshiream.com. Past performance does not guarantee future results.

Risks: Past performance does not guarantee future results. Different types of investments involve varying degrees of risk, and there can be no assurance that any specific investment will either be suitable or profitable for an individual's investment portfolio. Dividends are subject to change, are not guaranteed, and may be cut. Investing based on dividends alone may not be favorable as it does not include all material risks. There is no guarantee any stated (or implied) portfolio or performance objective mentioned by Berkshire can be met. Berkshire's equity style may focus its investments in certain sectors or industries, thereby increasing potential volatility relative to other strategies or indices. The dividend strategy may include bundled services also known as a "wrap fee program". Because there is typically a low turnover in the strategy, this may be more costly for some investors. No one should assume that any information presented serves as the receipt of, or a substitute for, personalized individual advice from a qualified advisor or any other investment professional.

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