



# CASUAL FRIDAY

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## What Can AI do for you?

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## #TGICasualFriday

### New Materials:

- In case you missed last week's issue: [Brevity Rules + Q2 Material Available](#)
- It contains updated marketing docs, lots of commentary and dividend increases.
- Trouble downloading? Email [gmihalick@berkshiream.com](mailto:gmihalick@berkshiream.com) or [Jreilly@berkshiream.com](mailto:Jreilly@berkshiream.com) or call 570.825.2600.

- Need a deep dive on the portfolio or asset gathering ideas? You can [Click here to schedule a phone call or virtual meeting \(Microsoft\)](#)

### Scale Up...with AI

We are often asked: "How can an Advisor scale up...and fast?" **Our idea? Lay legitimate claim to unmatched expertise** in a big-ticket-planning or tax strategy. Develop a true "superpower" that other advisors can't or won't learn.

Get so *good* at DB plans, 1031s, or executive comp issues, QSBS you could speak at conferences. Own the niche. Be like Liam Neeson and his "very special set of skills" in the movie "Taken." Forget virtually *everything* else. Be THAT good and specialized in one key area you become almost obsessed.

Next we prompted AI for a list of high ticket planning areas...and asked it to list a few initial steps to gain lift-off. It quickly generated about 20 different ideas but here are some sample results! AI is not only great for glorified searches and questions, it's great at creating business plans, calendar entries and workflows in a sequence.

Client Discovery Tactics	Pain Point / Need	"Did You Know?" Discovery Questions	"Did You Know?" Discovery Questions
Partner with top realtors, sponsor CRE webinars, target landlords near retirement	Real estate investors face capital gains and depreciation recapture tax when selling	"Did you know you can defer all taxes on appreciated investment property — potentially forever — using a 1031 exchange?"	Did you know that if you fail to identify replacement property within 45 days in a 1031 exchange, the entire gain becomes taxable — but if done right, you can defer all capital gains and depreciation recapture?
Network with M&A attorneys, speak at Vistage/EO events, target founders 50–65 on LinkedIn	Business owners often sell without pre-sale planning, losing 30–40% to taxes	"Did you know that a properly structured trust or pre-sale strategy could save you millions in capital gains on your business exit?"	Did you know that if you sell your business without pre-sale estate planning, you may miss the chance to move millions outside your estate using a GRAT or IDGT — potentially costing your heirs 40% in estate taxes?
Partner with estate attorneys, run asset protection content, target UHNW families	Wealthy families risk taxes, creditors, or divorces eroding their estates	"Did you know you can transfer millions out of your estate, protect it from lawsuits, and still benefit from it indirectly?"	Did you know that without a SLAT or DAPT in place, your assets could be exposed to future creditor claims and estate tax — but with proper trust design, you can retain spousal access and still remove assets from your taxable estate?
Target high-income professionals, build CPA alliances	High earners are capped on 401(k)s, leaving excess income exposed	"Did you know you can contribute \$200k+ per year in pre-tax dollars with a cash balance plan?"	Did you know that if you set up a cash balance plan before year-end, you can retroactively reduce last year's tax bill — and shelter over \$200,000 annually from income tax going forward?

\* "Peer group" - Morningstar groups managers reasonably considered to be close investment alternatives, and for which performance and other statistical measures, such as fees, are comparable.

## **An Alternative to Direct Indexing?**

And speaking of specialties, if you have a portfolio with lots of embedded gains but are worried about taxes from immediate changes, please consider our tax managed offering. We map the portfolio to our dividend strategy over time, within an advisor/client's tax budget.

Simply email us a spreadsheet and we can provide some analysis.

[British Open 2025: Everything you need to know about this year's major at Royal Portrush | Golf News and Tour Information | Golf Digest](#)

Have a great weekend.

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