BERKSHIRE DIVIDEND STRATEGY

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Casual Friday: He-Man "Returns" + Dividend Increases

#TGICasualFriday!

Dividend Increases:

- Chubb (NYSE: CB) announced a 5.2% dividend increase + $7.5B share repurchases
- PepsiCo (NYSE: PEP) announced a 4% dividend increase (54th consecutive annual increase)
- Lowe's (NYSE: LOW) announced a 4% dividend increase

(Source: Bloomberg)

Advisor Superpower?
We often opine that advisors who have a “superpower” create elite business models, serve ideal clients, and make more money…
Case in point: Kitces highlights an advisor charging $72,000+/year in flat tax consulting fees. His superpower? He cracked the code on the clients many struggle with — the entrepreneur with $2M+ in net income, a $600K–$700K tax bill, and almost nothing in an investable portfolio. More of a consultant type practice vs traditional advisory… *"We'll save you at least 2x what you pay us, or you get your money back*." *Earning Premium Planning Fees By Demonstrating Hard-Dollar Tax Savings For Business Owner Clients: #FASuccess Ep 491 With Patrick Lonergan:* https://www.kitces.com/blog/patrick-lonergan-491-vital-wealth-tax-savings-business-owners-planning-consulting/

He-Man "Returns” (Masters of the Universe launches June 5th)
Speaking of superpowers… He-Man is a full nostalgia trip for anyone who raced home for the cartoon or obsessed over Masters of the Universe in the '80s. Although, here's a part that might sting… A boxed $4.99 He-Man toy from the 80s is now selling for ~$1,100 online — returns of ~220x! One boxed set sold for $16,250 at auction. Sorry to those that unboxed and actually played with their toys 😊 https://www.lovetoknow.com/home/antiques-collectibles/7-most-valuable-he-man-masters-universe-toys-from-your-childhood

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Definitions: The S & P 500 Index is a market capitalization weighted index of the largest 500 U.S. stocks. It is a market-value weighted index (stock price times # of shares outstanding), with each stock's weight in the index proportionate to its market value. The index is designed to measure changes in the economy and is representative of most major industries. Russell 1000 Growth Index measures the performance of those Russell 1000 companies with higher price-to-book ratios and higher forecasted growth values. The index was developed with a base value of 200 as of August 31, 1992. Russell 1000 Value Index measures the performance of those Russell 1000 companies with lower price-to-book ratios and lower forecasted growth values. The index was developed with a base value of 200 as of August 31, 1992. You cannot invest directly in an index. BEst (Bloomberg Estimates) Earnings Per Share (EPS Adjusted) estimate returns Earnings Per Share from Continuing Operations, which may exclude the effects of one-time and extraordinary gains/losses. Beta is a measure of volatility vs. an index. Upside/Downside capture ratios refer to a portfolios performance as a percentage of either positive returns (upside) or negative returns (downside) vs. an index. Standard Deviation is a measure of total risk. Alpha, Beta and capture ratios are represented as calculated by Morningstar.

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