Berkshire Advisors, Inc.
REGISTERED INVESTMENT ADVISOR

Berkshire Advisors Multi Family Office Profile

“WE DON’T JUST MANAGE WEALTH
WE HELP YOU MANAGE LIFE”

MISSION

Berkshire Advisors Multi-Family Office’s mission is to design and construct individually tailored investment plans, by investing in multiple asset classes and only utilizing the asset classes that we believe are best suited to deliver the desired results, while balancing growth, income and risk to attain the goals and objectives of our clients.

INVESTMENT- MANAGEMENT

The hallmark of Berkshires investment philosophy is to seek the lowest risk approach to providing consistent positive returns under normal market conditions. In an attempt to achieve these results based on a clients risk tolerance, we construct portfolios which often combine uncorrelated and correlated traditional market products. We do not limit asset allocation only to stocks, bonds and ETF’s.

By reviewing economic trends, we conduct an extensive analysis to determine which asset classes can potentially provide the best risk-return trade off. We are able to eliminate unnecessary exposure to asset classes that are expected to underperform and, therefore, capture relative returns.

Berkshire is able to match each client’s investment objectives and liquidity needs with the relative returns of favorable asset classes.

SERVICES FOR FAMILY OFFICE CLIENTS

1.) PERSONAL INVESTMENTS FINANCIAL PLANNING

- ASSET ALLOCATIONS
- INVESTMENT MANAGER VETTING
- FINANCIAL PLANNING
- MERCHANT BANKING
- INVESTMENT BANKING
- CONSUMER CREDIT/ MORTGAGES
- COMMERCIAL CREDIT
- PRIVATE BANKING
- INSURANCES (Ind., Estate, Corporate)

2.) BUSINESS OWNERS

- 401k ADMINISTRATION
- BUSINESS SUCCESSION PLAN
- MERGERS & ACQUISITIONS
- LIQUIDITY PROVIDERS
- PROCURING CREDIT
- EQUIPMENT LEASING

3.) PERSONAL SUCCESSION & ESTATE PLANNING

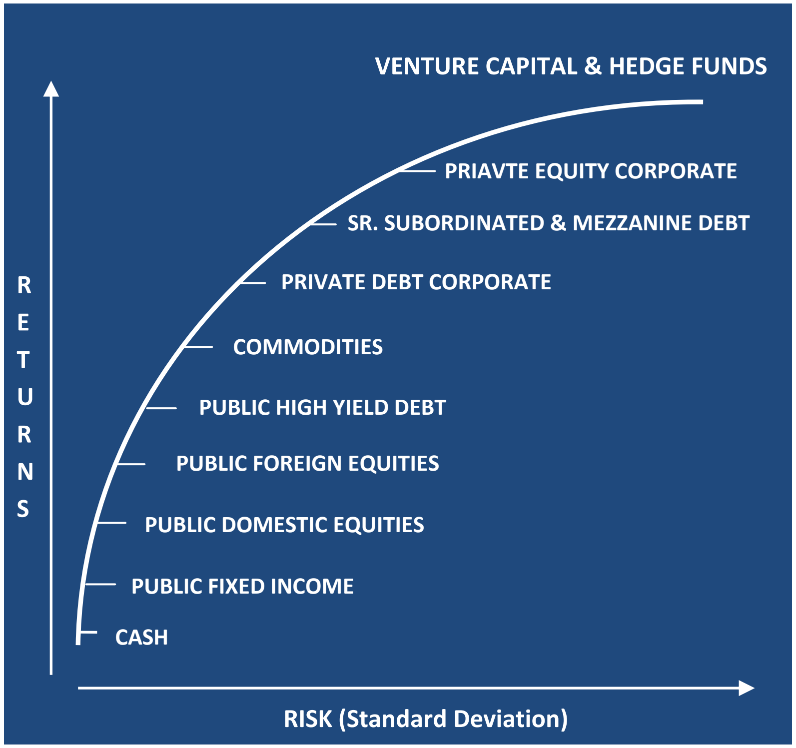
- ESTATE PLANNING
- LIVING WILL’S – BASIC WILL
- TRUST ACCOUNT SET-UP
- INSURANCE TRUSTS

4.) PERSONAL ADMINISTRATIVE

- DATA AGGREGATION
- BILL PAYING
- COORDINATE - PREPARE TAX RETURNS
- PERSONAL BOOK KEEPING

BERKSHIRE SEEKS TO DIVERSIFY RISK AND OPTIMIZE RETURN

(FOR ILLUSTRATIVE PURPOSES ONLY)



FOR MORE INFORMATION

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