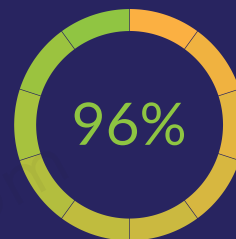


# Berkshire Money Management

TRUST SCORE



Berkshire Money Management, federally registered in 2003, is a Registered Investment Advisor (RIA) in 29 state(s) with a licensed staff of 9 advisors. Berkshire Money Management manages \$470.9 million and provides investment advisory services for 572 clients (1:64 advisor/client ratio).

Berkshire Money Management requires a \$5,000 minimum investment.

## BENEFITS

- Firm does not have any felony convictions
- Firm does not have a disciplinary history
- Firm uses a transparent fee-only model
- Firm has been federally registered for 16 years
- Communications sent to the firm's website are secure and encrypted
- Firm does not have any misdemeanor convictions
- Firm does not have an insurance agent conflict
- Firm does not privately manage or own the products they recommend
- Firm does not offer proprietary products
- Firm does not have an attorney conflict
- Firm does not accept performance-based fees

## CONSIDERATIONS

- Firm has less than \$1B in assets under management

## BENEFITS (cont.)

Firm does not perform side-by-side management

Firm does not receive soft dollar benefits

Firm provides mobile-friendly experience for their clients

## CONSIDERATIONS (cont.)