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Composite performance shown on this website is presented net of advisory fees and reflects the reinvestment of dividends and other earnings. Performance is shown as of the date indicated and is not updated continuously. Returns for periods longer than one year are annualized. Current-quarter figures are preliminary and subject to revision.

Performance before January 1, 2020 was achieved by the same portfolio manager at a prior firm.

Benchmark comparisons are provided for context only. The S&P 500 Total Return Index is an unmanaged index that reflects no advisory fees, transaction costs, or other expenses, and is not available for direct investment. BWM's strategies are concentrated, typically holding 18–25 positions, and differ materially from the composition of any index shown. Comparison to an index is not an indication that the strategy is managed to, or constrained by, that index.

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Contact

Burke Wealth Management LLC · 3355 W Alabama St., Suite 910, Houston, TX 77098 · (713) 933-5402