

# Small Cap Growth Equity Composite

## Performance Presentation (Reported in USD)

Index: Russell 2000® Growth

Period	Returns			3 Yr. Annualized Standard Deviation		Dispersion	As of December 31st		
	Total Gross Return	Total Net Return	Index	Composite	Index	Internal Asset Wtd.	Number of Portfolios	Composite Assets (\$MM)	Total Firm Assets (\$MM)
2022	-24.83%	-25.29%	-26.36%	24.52%	26.20%	0.37%	47	1,726	13,316
2021	10.76%	10.12%	2.83%	21.65%	23.07%	0.30%	47	2,368	17,023
2020	39.69%	38.86%	34.63%	23.90%	25.10%	0.87%	44	2,348	17,123
2019	43.40%	42.50%	28.48%	16.18%	16.37%	0.27%	37	1,751	14,463
2018	-9.88%	-10.46%	-9.31%	16.12%	16.46%	0.57%	40	1,395	11,861
2017	25.74%	24.94%	22.17%	14.37%	14.59%	0.22%	45	1,981	13,927
2016	6.93%	6.24%	11.32%	15.55%	16.67%	0.45%	41	1,589	11,753
2015	-0.45%	-1.09%	-1.38%	14.37%	14.95%	0.20%	44	1,598	15,407
2014	8.68%	7.98%	5.60%	13.04%	13.82%	0.35%	42	1,874	17,498
2013	45.50%	44.59%	43.30%	18.71%	17.27%	0.50%	48	1,915	17,377

The **Small Cap Growth Equity Composite** contains fully discretionary accounts that focus on long-term growth of capital by investing in equity securities of predominately small cap companies that are within the market capitalization range of the Russell 2000® Growth index at the time of initial purchase with potential for growth. There is no minimum account size for this composite. For comparison purposes, the composite is evaluated against the Russell 2000® Growth index, which is designed to measure the domestic Small Cap growth equity segment. Index returns are not covered by the report of independent verifiers and are provided for informational purposes only. The index returns assume the reinvestment of dividends but do not reflect the impact of fees, applicable taxes or trading costs which may also reduce the returns shown. Securities contained in the index maybe different than the securities contained in the composite and could have different risk and reward profiles.

Westfield Capital Management Company, L.P. claims compliance with the Global Investment Performance Standards (GIPS®) and has prepared and presented this report in compliance with the GIPS standards. Westfield Capital Management Company, L.P. has been independently verified for the periods January 1, 2000 through December 31, 2022. A firm that claims compliance with the GIPS standards must establish policies and procedures for complying with all the applicable requirements of the GIPS standards. Verification provides assurance on whether the firm's policies and procedures related to composite and pooled fund maintenance, as well as the calculation, presentation, and distribution of performance, have been designed in compliance with the GIPS standards and have been implemented on a firm-wide basis. The Small Cap Growth Equity Composite has had a performance examination for the periods from January 1, 1993 to December 31, 2022. The verification and performance examination reports are available upon request. GIPS® is a registered trademark of CFA Institute. CFA Institute does not endorse or promote this organization, nor does it warrant the accuracy, or the quality of the content contained herein.

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The U.S. Dollar is the currency used to express performance. Both gross and net returns reflect the deduction of transaction costs and the reinvestment of income. The returns shown above may be lower if income is not reinvested. Gross returns do not reflect the deduction of investment advisory fees or any other expenses that may be incurred in the management of the account. Net performance was calculated using actual management fees, which includes performance fees. For accounts that were charged a performance-based fee, net performance for these accounts was calculated using the highest applicable management fee, based on the composite's tiered management fee schedule for the period, applied monthly, unless the performance fee was higher. The performance-based fees typically consist of a base fee component and a total maximum fee of 1.30%. Information regarding period specific fee schedules is available upon request. The three-year annualized standard deviation measures the variability of the composite gross returns, and the benchmark returns over the preceding 36-month period. The annual composite dispersion presented is an asset-weighted standard deviation calculated for the accounts in the composite the entire year using gross returns. Policies for valuing investments, calculating performance, and preparing GIPS Reports are available upon request. Beginning January 1, 2010, accounts with significant cash flows (defined as exceeding 50% of an account's total assets) are taken out of the composite for the month during which the cash flow occurred.

The Small Cap Growth Equity Composite inception date is July 1, 1989. The Small Cap Growth Equity Composite creation date is January 1, 2000. The management fee schedule for this composite is 1.00% on the first \$25 million; 0.75% on the next \$50 million; and 0.60% on assets in excess of \$75 million. Actual investment advisory fees incurred by clients may vary.

# Small/Mid Cap Growth Equity Composite

## Performance Presentation (Reported in USD)

Index: Russell 2500™ Growth

Period	Returns			3 Yr. Annualized Standard Deviation		Dispersion	As of December 31st		
	Total Gross Return	Total Net Return	Index	Composite	Index	Internal Asset Wtd.	Number of Portfolios	Composite Assets (\$MM)	Total Firm Assets (\$MM)
2022	-23.16%	-23.75%	-26.21%	25.28%	25.18%	0.36%	50	3,025	13,316
2021	16.76%	15.97%	5.04%	22.33%	21.97%	0.27%	51	3,031	17,023
2020	34.71%	33.78%	40.47%	24.34%	23.93%	0.65%	56	2,969	17,123
2019	35.57%	34.64%	32.65%	15.38%	15.85%	0.18%	43	1,939	14,463
2018	-7.36%	-8.03%	-7.47%	16.08%	15.33%	0.27%	47	1,756	11,861
2017	31.54%	30.58%	24.46%	14.88%	13.04%	0.27%	47	2,159	13,927
2016	4.16%	3.37%	9.73%	15.56%	14.67%	0.20%	60	2,013	11,753
2015	-3.30%	-4.01%	-0.19%	13.38%	13.29%	0.17%	71	2,822	15,407
2014	8.18%	7.44%	7.05%	12.95%	12.54%	0.27%	70	3,390	17,498
2013	38.38%	37.43%	40.65%	17.36%	16.48%	0.45%	75	3,878	17,377

The **Small/Mid Cap Growth Equity Composite** contains fully discretionary accounts that focus on long-term growth of capital by investing in equity securities of predominately small to mid cap companies that are within the market capitalization range of the Russell 2500™ Growth Index at the time of initial purchase with potential for growth. There is no minimum account size for this composite. For comparison purposes, the composite is evaluated against the Russell 2500™ Growth index, which is designed to measure the domestic Small/Mid Cap growth equity segment. Index returns are not covered by the report of independent verifiers and are provided for informational purposes only. The index returns assume the reinvestment of dividends but do not reflect the impact of fees, applicable taxes or trading costs which may also reduce the returns shown. Securities contained in the index maybe different than the securities contained in the composite and could have different risk and reward profiles.

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The Small/Mid Cap Growth Equity Composite inception date is April 1, 1992. The Small/Mid Cap Growth Equity Composite creation date is January 1, 2000. The management fee schedule for this composite is 1.00% on the first \$25 million; 0.75% on the next \$50 million; and 0.60% on assets in excess of \$75 million. Actual investment advisory fees incurred by clients may vary.

# Mid Cap Growth Equity Composite

Performance Presentation (Reported in USD)

Index: Russell Midcap® Growth

Period	Returns			3 Yr. Annualized Standard Deviation		Dispersion	As of December 31st		
	Total Gross Return	Total Net Return	Index	Composite	Index	Internal Asset Wtd.	Number of Portfolios	Composite Assets (\$MM)	Total Firm Assets (\$MM)
2022	-25.34%	-25.69%	-26.72%	24.43%	24.53%	0.15%	32	3,115	13,316
2021	17.20%	16.70%	12.73%	20.71%	20.19%	0.50%	32	3,527	17,023
2020	29.09%	28.51%	35.59%	22.11%	21.45%	0.54%	37	4,008	17,123
2019	43.64%	43.01%	35.47%	13.73%	13.88%	0.66%	24	2,994	14,463
2018	-2.43%	-2.89%	-4.75%	12.68%	12.82%	0.36%	23	2,024	11,861
2017	25.52%	25.01%	25.27%	11.62%	10.89%	0.24%	24	1,940	13,927
2016	5.68%	5.11%	7.33%	12.65%	12.18%	0.42%	25	1,341	11,753
2015	1.94%	1.38%	-0.20%	12.14%	11.31%	0.39%	28	1,971	15,407
2014	14.13%	13.48%	11.90%	11.83%	10.87%	0.45%	34	2,021	17,498
2013	36.44%	35.67%	35.74%	16.83%	14.62%	0.45%	30	1,954	17,377

The **Mid Cap Growth Equity Composite** contains fully discretionary accounts that focus on long-term growth of capital by investing in equity securities of predominately mid cap companies that are within the market capitalization range of the Russell Midcap® Growth Index at the time of initial purchase with potential for growth. There is no minimum account size for this composite. For comparison purposes, the composite is evaluated against the Russell Midcap® Growth Index, which is designed to measure the domestic Mid Cap growth equity segment. Index returns are not covered by the report of independent verifiers and are provided for informational purposes only. The index returns assume the reinvestment of dividends but do not reflect the impact of fees, applicable taxes or trading costs which may also reduce the returns shown. Securities contained in the index maybe different than the securities contained in the composite and could have different risk and reward profiles.

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The U.S. Dollar is the currency used to express performance. Both gross and net returns reflect the deduction of transaction costs and the reinvestment of income. The returns shown above may be lower if income is not reinvested. Gross returns do not reflect the deduction of investment advisory fees or any other expenses that may be incurred in the management of the account. Net performance was calculated using actual management fees. Information regarding period specific fee schedules is available upon request. The three-year annualized standard deviation measures the variability of the composite gross returns, and the benchmark returns over the preceding 36-month period. The annual composite dispersion presented is an asset-weighted standard deviation calculated for the accounts in the composite the entire year using gross returns. Policies for valuing investments, calculating performance, and preparing GIPS Reports are available upon request. Beginning January 1, 2010, accounts with significant cash flows (defined as exceeding 50% of an account's total assets) are taken out of the composite for the month during which the cash flow occurred.

The Mid Cap Growth Equity Composite inception date is July 1, 1994. The Mid Cap Growth Equity Composite create date is January 1, 2000. The management fee schedule for this composite is 0.80% on the first \$25 million; 0.70% on the next \$50 million; 0.60% on assets in excess of \$75 million. Actual investment advisory fees incurred by clients may vary.

# Large Cap Growth Equity Composite

## Performance Presentation (Reported in USD)

Index: Russell 1000® Growth

Period	Returns			3 Yr. Annualized Standard Deviation		Dispersion	As of December 31st		
	Total Gross Return	Total Net Return	Index	Composite	Index	Internal Asset Wtd.	Number of Portfolios	Composite Assets (\$MM)	Total Firm Assets (\$MM)
2022	-28.88%	-29.25%	-29.14%	22.53%	23.47%	0.28%	52	2,947	13,316
2021	24.34%	23.76%	27.60%	18.29%	18.17%	0.26%	49	4,193	17,023
2020	35.61%	34.87%	38.49%	20.03%	19.64%	0.58%	53	4,221	17,123
2019	37.04%	36.34%	36.39%	13.83%	13.07%	0.29%	48	3,574	14,463
2018	-1.45%	-1.91%	-1.51%	12.34%	12.13%	0.37%	62	3,694	11,861
2017	31.68%	31.02%	30.21%	11.44%	10.54%	0.53%	62	4,139	13,927
2016	3.44%	2.89%	7.08%	11.95%	11.15%	0.34%	82	3,421	11,753
2015	3.60%	3.08%	5.67%	11.62%	10.70%	0.20%	102	5,116	15,407
2014	12.49%	11.92%	13.05%	10.65%	9.59%	0.46%	118	6,144	17,498
2013	37.63%	36.93%	33.48%	14.84%	12.18%	0.89%	136	6,076	17,377

The **Large Cap Growth Equity Composite** contains fully discretionary accounts that focus on long-term growth of capital by investing in equity securities of predominately large cap companies that are within the market capitalization range of the Russell 1000® Growth Index at the time of initial purchase with potential for growth. There is no minimum account size for this composite. For comparison purposes, the composite is evaluated against the Russell 1000® Growth index, which is designed to measure the domestic Large Cap growth equity segment. Index returns are not covered by the report of independent verifiers and are provided for informational purposes only. The index returns assume the reinvestment of dividends but do not reflect the impact of fees, applicable taxes or trading costs which may also reduce the returns shown. Securities contained in the index may be different than the securities contained in the composite and could have different risk and reward profiles.

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The Large Cap Growth Equity Composite inception date is July 1, 1989. The Large Cap Growth Equity Composite creation date is January 1, 2000. The management fee schedule for this composite is 0.65% on the first \$25 million; 0.60% on the next \$25 million; 0.55% on the next \$25 million; 0.50% on assets in excess of \$75 million. Actual investment advisory fees incurred by clients may vary.

# All Cap Growth Equity Composite

## Performance Presentation (Reported in USD)

Index: Russell 3000® Growth

Period	Returns			3 Yr. Annualized Standard Deviation		Dispersion	As of December 31st		
	Total Gross Return	Total Net Return	Index	Composite	Index	Internal Asset Wtd.	Number of Portfolios	Composite Assets (\$MM)	Total Firm Assets (\$MM)
2022	-27.74%	-28.16%	-28.97%	22.37%	23.43%	0.13%	27	847	13,316
2021	24.08%	23.40%	25.85%	18.22%	18.27%	0.24%	29	1,163	17,023
2020	35.05%	34.30%	38.26%	19.99%	19.87%	0.47%	33	1,074	17,123
2019	43.44%	42.53%	35.85%	13.55%	13.20%	0.37%	26	1,028	14,463
2018	-2.92%	-3.54%	-2.12%	12.73%	12.29%	0.20%	36	985	11,861
2017	29.54%	28.74%	29.59%	12.09%	10.62%	0.70%	40	1,351	13,927
2016	1.62%	0.98%	7.39%	12.96%	11.34%	0.45%	51	1,297	11,753
2015	-1.05%	-1.67%	5.09%	12.64%	10.80%	0.18%	57	1,532	15,407
2014	12.91%	12.19%	12.44%	12.30%	9.74%	0.32%	58	1,769	17,498
2013	39.73%	38.85%	34.23%	16.58%	12.49%	0.64%	48	1,333	17,377

The All Cap Growth Equity Composite contains fully discretionary, diversified, institutional accounts managed in the All Cap Growth style. Accounts typically hold greater than 40 securities. The "All Cap Growth" style focuses on the long-term growth of capital by investing in equity securities with potential for growth, and of any capitalization. There is no minimum account size for this composite. For comparison purposes, the composite is evaluated against the Russell 3000® Growth Index, which is designed to measure the domestic All Cap Growth equity segment. Index returns are not covered by the report of independent verifiers and are provided for informational purposes only. The index returns assume the reinvestment of dividends but do not reflect the impact of fees, applicable taxes or trading costs which may also reduce the returns shown. Securities contained in the index maybe different than the securities contained in the composite and could have different risk and reward profiles.

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The All Cap Growth Equity Composite inception date is October 1, 2006. The All Cap Growth Equity Composite creation date is July 1, 2007. The management fee schedule for this composite is 0.75% on the first \$25 million and 0.65% per annum on the next \$75 million; and 0.50% on assets in excess of \$100 million. Actual investment advisory fees incurred by clients may vary.

# Select Growth Equity Composite

## Performance Presentation (Reported in USD)

Index: Russell 1000® Growth

Period	Returns			3 Yr. Annualized Standard Deviation		Dispersion	As of December 31st		
	Total Gross Return	Total Net Return	Index	Composite	Index	Internal Asset Wtd.	Number of Portfolios	Composite Assets (\$MM)	Total Firm Assets (\$MM)
2022	-28.44%	-28.99%	-29.14%	22.40%	23.47%	N/M	<5	440	13,316
2021	22.84%	21.94%	27.60%	18.32%	18.17%	N/M	<5	914	17,023
2020	37.82%	36.82%	38.49%	20.00%	19.64%	N/M	<5	969	17,123
2019	48.95%	47.42%	36.39%	13.54%	13.07%	N/M	<5	773	14,463
2018	1.70%	0.94%	-1.51%	12.75%	12.13%	N/M	<5	189	11,861
2017	24.89%	23.97%	30.21%	11.64%	10.54%	N/M	<5	198	13,927
2016	5.58%	4.79%	7.08%	13.09%	11.15%	N/M	<5	111	11,753
2015	3.71%	2.94%	5.67%	N/A	N/A	N/M	<5	105	15,407
2014	19.82%	18.94%	13.05%	N/A	N/A	N/M	<5	7	17,498

The **Select Growth Equity Composite** contains full discretionary accounts that focus on long-term growth of capital by investing in a portfolio of 35 or fewer equity securities of predominantly large capitalization companies with a minimum market capitalization of \$5 Billion at the time of initial purchase. For comparison purposes, the composite is evaluated against the Russell 1000® Growth Index, which is designed to measure the domestic Large Cap growth equity segment. Index returns are not covered by the report of independent verifiers. The index referenced herein is provided for informational purposes only. Index returns assume the reinvestment of dividends but do not reflect the impact of fees, applicable taxes or trading costs which may also reduce the returns shown. Securities contained in the index maybe different than the securities contained in the composite and could have different risk and reward profiles.

Westfield Capital Management Company, L.P. claims compliance with the Global Investment Performance Standards (GIPS®) and has prepared and presented this report in compliance with the GIPS standards. Westfield Capital Management Company, L.P. has been independently verified for the periods January 1, 2000 through December 31, 2022. A firm that claims compliance with the GIPS standards must establish policies and procedures for complying with all the applicable requirements of the GIPS standards. Verification provides assurance on whether the firm's policies and procedures related to composite and pooled fund maintenance, as well as the calculation, presentation, and distribution of performance, have been designed in compliance with the GIPS standards and have been implemented on a firm-wide basis. The Select Growth Equity Composite has had a performance examination for the periods January 1, 2014 to December 31, 2022. The verification and performance examination reports are available upon request. GIPS® is a registered trademark of CFA Institute. CFA Institute does not endorse or promote this organization, nor does it warrant the accuracy, or the quality of the content contained herein.

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The U.S. Dollar is the currency used to express performance. Both gross and net returns reflect the deduction of transaction costs and the reinvestment of income. The returns shown above may be lower if income is not reinvested. Gross returns do not reflect the deduction of investment advisory fees or any other expenses that may be incurred in the management of the account. Net performance was calculated using actual management fees, which includes performance fees. For accounts that were charged a performance-based fee, net performance for these accounts was calculated using the highest applicable management fee, based on the composite's tiered management fee schedule for the period, applied monthly, unless the performance fee was higher. The performance-based fees typically consist of a base fee component and a total maximum fee of 1.30%. Information regarding period specific fee schedules is available upon request. The three-year annualized standard deviation measures the variability of the composite gross returns, and the benchmark returns over the preceding 36-month period. The three-year annualized standard deviation is not presented for 2014 and 2015 because the composite did not yet have 36 monthly returns. The annual composite dispersion presented is an asset-weighted standard deviation calculated for the accounts in the composite the entire year using gross returns. For those periods with fewer than five accounts included for the entire year, "N/M" is noted as the dispersion is not considered meaningful. Policies for valuing investments, calculating performance, and preparing GIPS Reports are available upon request.

The Select Growth Equity Composite inception date is January 1, 2014. The Select Growth Equity Composite creation date is February 1, 2014. The management fee schedule for this composite is 0.75% on all assets. Actual investment advisory fees incurred by clients may vary.

# Dividend Growth Equity Composite

## Performance Presentation (Reported in USD)

Index: NASDAQ U.S. Dividend Achievers Select®

Period	Returns			3 Yr. Annualized Standard Deviation		Dispersion	As of December 31st		
	Total Gross Return	Total Net Return	Index	Composite	Index	Internal Asset Wtd.	Number of Portfolios	Composite Assets (\$MM)	Total Firm Assets (\$MM)
2022	-12.25%	-12.80%	-9.52%	19.92%	18.53%	0.62%	6	237	13,316
2021	27.59%	26.74%	23.52%	17.00%	15.24%	0.44%	7	350	17,023
2020	17.06%	16.27%	15.62%	17.41%	16.17%	0.57%	7	305	17,123
2019	34.25%	33.36%	29.75%	11.13%	11.25%	0.35%	7	325	14,463
2018	-2.53%	-3.19%	-1.98%	9.90%	10.38%	0.33%	7	256	11,861
2017	22.36%	21.54%	22.29%	9.26%	9.11%	0.14%	7	276	13,927
2016	8.93%	8.20%	11.93%	10.43%	10.00%	0.68%	7	240	11,753
2015	-0.29%	-0.99%	-1.88%	10.87%	10.67%	N/M	5	196	15,407
2014	10.44%	9.63%	10.12%	9.15%	8.73%	N/M	<5	128	17,498
2013	28.30%	27.37%	29.03%	10.30%	10.50%	N/M	<5	70	17,377

The **Dividend Growth Equity Composite** contains fully discretionary accounts that focus on long-term growth of capital by investing in equity securities of predominately large capitalization companies with a history or prospect of paying increasing dividends. For comparison purposes, the composite is measured against the NASDAQ U.S. Dividend Achievers Select® index. The NASDAQ U.S. Dividend Achievers Select® Index is constructed to reflect the performance of companies that trade on the NYSE or NASDAQ and have increased their annual regular dividend payments for the last ten or more consecutive years. Index returns are not covered by the report of independent verifiers and are provided for informational purposes only. The index returns assume the reinvestment of dividends but do not reflect the impact of fees, applicable taxes or trading costs which may also reduce the returns shown. Securities contained in the index maybe different than the securities contained in the composite and could have different risk and reward profiles.

Westfield Capital Management Company, L.P. claims compliance with the Global Investment Performance Standards (GIPS®) and has prepared and presented this report in compliance with the GIPS standards. Westfield Capital Management Company, L.P. has been independently verified for the periods January 1, 2000 through December 31, 2022. A firm that claims compliance with the GIPS standards must establish policies and procedures for complying with all the applicable requirements of the GIPS standards. Verification provides assurance on whether the firm's policies and procedures related to composite and pooled fund maintenance, as well as the calculation, presentation, and distribution of performance, have been designed in compliance with the GIPS standards and have been implemented on a firm-wide basis. The Dividend Growth Equity Composite has had a performance examination for the periods July 1, 2010 to December 31, 2022. The verification and performance examination reports are available upon request. GIPS® is a registered trademark of CFA Institute. CFA Institute does not endorse or promote this organization, nor does it warrant the accuracy, or the quality of the content contained herein.

Westfield Capital Management Company, L.P. is an SEC-registered investment adviser dedicated to providing quality, separate account investment management services to institutions and high net worth individuals. Registration does not imply a certain level of skill or training. Westfield supervises mainly domestic growth equities, with investment strategies – also known as products – focusing on each segment of the capitalization spectrum. Westfield also supervises foreign equities that are traded on U.S. stock exchanges and non-U.S. stock exchanges. The firm's list of composite descriptions and limited distribution pooled funds is available upon request. Past performance is not indicative of future results. The performance of any individual account may vary from the composite performance provided above.

The U.S. Dollar is the currency used to express performance. Both gross and net returns reflect the deduction of transaction costs and the reinvestment of income. The returns shown above may be lower if income is not reinvested. Gross returns do not reflect the deduction of investment advisory fees or any other expenses that may be incurred in the management of the account. Net performance was calculated using actual management fees. Information regarding period specific fee schedules is available upon request. The three-year annualized standard deviation measures the variability of the composite gross returns, and the benchmark returns over the preceding 36-month period. The three-year annualized standard deviation is not presented for 2011 and 2012 because the composite did not yet have 36 monthly returns. The annual composite dispersion presented is an asset-weighted standard deviation calculated for the accounts in the composite the entire year using gross returns. For those periods with fewer than five accounts included for the entire year, "N/M" is noted as the dispersion is not considered meaningful. Policies for valuing investments, calculating performance, and preparing GIPS Reports are available upon request.

The Dividend Growth Equity Composite inception date is July 1, 2010. The Dividend Growth Equity Composite creation date is January 1, 2011. The management fee schedule for this composite is 0.75% on all assets. Actual investment advisory fees incurred by clients may vary.

# Sustainable Growth Equity Composite

## Performance Presentation (Reported in USD)

Index: Russell 1000® Growth

Period	Returns			3 Yr. Annualized Standard Deviation		Dispersion	As of December 31st		
	Total Gross Return	Total Net Return	Index	Composite	Index	Internal Asset Wtd.	Number of Portfolios	Composite Assets (\$MM)	Total Firm Assets (\$MM)
2022	-29.67%	-30.14%	-29.14%	22.80%	23.47%	0.06%	6	44	13,316
2021	21.78%	21.01%	27.60%	17.98%	18.17%	0.04%	6	64	17,023
2020	38.21%	37.32%	38.49%	19.40%	19.64%	N/M	6	52	17,123
2019	42.98%	42.04%	36.39%	13.48%	13.07%	N/M	<5	6	14,463
2018	-0.50%	-1.20%	-1.51%	12.16%	12.13%	N/M	<5	6	11,861
2017	32.39%	31.43%	30.21%	N/A	N/A	N/M	<5	2	13,927
2016	2.47%	1.71%	7.08%	N/A	N/A	N/M	<5	2	11,753

*The Sustainable Growth Equity Composite contains fully discretionary accounts that focus on long-term growth of capital by investing in a portfolio of approximately 35 to 50 equity securities typically with a market capitalization of \$6 billion or more at the time of initial purchase, which exhibit potential growth and favorable performance in Environmental, Social and Governance (“ESG”) characteristics. For comparison purposes, the composite is evaluated against the Russell 1000® Growth Index, which is designed to measure the Large Cap growth equity segment. Index returns are not covered by the report of independent verifiers and are provided for informational purposes only. The index returns assume the reinvestment of dividends but do not reflect the impact of fees, applicable taxes or trading costs which may also reduce the returns shown. Securities contained in the index maybe different than the securities contained in the composite and could have different risk and reward profiles.*

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The U.S. Dollar is the currency used to express performance. Both gross and net returns reflect the deduction of transaction costs and the reinvestment of income. The returns shown above may be lower if income is not reinvested. Gross returns do not reflect the deduction of investment advisory fees or any other expenses that may be incurred in the management of the account. Net performance was calculated using actual management fees. Information regarding period specific fee schedules is available upon request. The three-year annualized standard deviation measures the variability of the composite’s gross returns, and the benchmark returns over the preceding 36-month period. The three-year annualized standard deviation is not presented for 2016 and 2017 because the composite did not yet have 36 monthly returns. The annual composite dispersion presented is an asset-weighted standard deviation calculated for the accounts in the composite the entire year using gross returns. For those periods with fewer than five accounts included for the entire year, “N/M” is noted as the dispersion is not considered meaningful. Policies for valuing investments, calculating performance, and preparing GIPS Reports are available upon request.

The Sustainable Growth Equity Composite inception date is January 1, 2016. The Sustainable Growth Equity Composite creation date is February 1, 2016. The management fee schedule for this composite is 0.75% on all assets. Actual investment advisory fees incurred by clients may vary.



# Health Care Composite

## Performance Presentation (Reported in USD)

Index: Russell 3000® Growth Health Care Index

Period	Returns			3 Yr. Annualized Standard Deviation		Dispersion	As of December 31st		
	Total Gross Return	Total Net Return	Index	Composite	Index	Internal Asset Wtd.	Number of Portfolios	Composite Assets (\$MM)	Total Firm Assets (\$MM)
2022	-12.48%	-13.06%	-14.48%	N/A	N/A	N/M	<5	3	13,316
2021	11.17%	10.45%	13.82%	N/A	N/A	N/M	<5	4	17,023
2020*	13.90%	13.72%	11.38%	N/A	N/A	N/M	<5	1	17,123

\*Represents data from 10/1/2020 through 12/31/2020

The **Health Care Composite** contains fully discretionary accounts that focus on long-term growth of capital by investing in a portfolio of approximately 30-50 health care specific equity securities with any market capitalization. For comparison purposes, the composite is evaluated against the Russell 3000® Growth Health Care Index. Prior to January 1, 2022, the Russell 3000® Health Care Index was used as the primary benchmark. The benchmark was changed given the investment strategy's growth focus versus a core strategy. Index returns are not covered by the report of independent verifiers and are provided for informational purposes only. The index returns assume the reinvestment of dividends but do not reflect the impact of fees, applicable taxes or trading costs which may also reduce the returns shown. Securities contained in the index maybe different than the securities contained in the composite and could have different risk and reward profiles.

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The U.S. Dollar is the currency used to express performance. Both gross and net returns reflect the deduction of transaction costs and the reinvestment of income. Gross returns do not reflect the deduction of investment advisory fees or any other expenses that may be incurred in the management of the account. Net performance was calculated using actual management fees. Information regarding period specific fee schedules is available upon request. The three-year annualized standard deviation measures the variability of the composite gross-of-fees returns and the benchmark returns over the preceding 36-month period. The three-year annualized standard deviation is not presented because the composite did not yet have 36 monthly returns. The annual composite dispersion presented is an asset-weighted standard deviation calculated for the accounts in the composite the entire year using gross returns. For those periods with fewer than five accounts included for the entire year, "N/M" is noted as the dispersion is not considered meaningful. Policies for valuing investments, calculating performance, and preparing GIPS Reports are available upon request.

The Health Care Composite inception date is October 1, 2020. The Health Care Composite creation date is November 1, 2020. The management fee schedule for this composite is 0.65% on all assets. Actual investment advisory fees incurred by clients may vary.

# Disruptive Innovation Composite

## Performance Presentation (Reported in USD)

Index: Russell 1000® Growth

Period	Returns			3 Yr. Annualized Standard Deviation		Dispersion	As of December 31st		
	Total Gross Return	Total Net Return	Index	Composite	Index	Internal Asset Wtd.	Number of Portfolios	Composite Assets (\$MM)	Total Firm Assets (\$MM)
2022	-39.29%	-39.85%	-29.14%	25.10%	23.47%	N/M	<5	2	13,316
2021	6.60%	5.65%	27.60%	N/A	N/A	N/M	<5	2	17,023
2020	55.55%	54.21%	38.49%	N/A	N/A	N/M	<5	2	17,123
2019*	18.04%	17.78%	10.62%	N/A	N/A	N/M	<5	1	14,463

\*Represents data from 10/1/2019 through 12/31/2019

The **Disruptive Innovation Composite** contains fully discretionary accounts that focus on long-term growth of capital by investing in a portfolio of approximately 40-50 equity securities with any market capitalization. For comparison purposes, the composite is evaluated against the Russell 1000® Growth Index. Prior to July 1, 2023, the S&P 500® Index was used for comparison purposes. Index returns are not covered by the report of independent verifiers and are provided for informational purposes only. The index returns assume the reinvestment of dividends but do not reflect the impact of fees, applicable taxes or trading costs which may also reduce the returns shown. Securities contained in the index maybe different than the securities contained in the composite and could have different risk and reward profiles.

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The U.S. Dollar is the currency used to express performance. Both gross and net returns reflect the deduction of transaction costs and the reinvestment of income. The returns shown above may be lower if income is not reinvested. Gross returns do not reflect the deduction of investment advisory fees or any other expenses that may be incurred in the management of the account. Net performance was calculated using actual management fees. Information regarding period specific fee schedules is available upon request. The three-year annualized standard deviation measures the variability of the composite, and the benchmark returns over the preceding 36-month period. The three-year annualized standard deviation is not presented prior to 2022 because the composite did not yet have 36 monthly returns. The annual composite dispersion is an asset-weighted standard deviation calculated for the accounts in the composite the entire year using gross returns. For those periods with fewer than five accounts included for the entire year, "N/M" is noted as the dispersion is not considered meaningful. Policies for valuing investments, calculating performance, and preparing GIPS Reports are available upon request.

The Disruptive Innovation Composite inception date is October 1, 2019. The Disruptive Innovation Composite creation date is November 1, 2019. The management fee schedule for this composite is 0.90% on all assets. Actual investment advisory fees incurred by clients may vary.