



## Westfield Capital Large Cap Growth Fund Frequently Asked Questions

### Who is Westfield Capital Management?

- Westfield Capital Management Company, L.P., was founded in 1989 and is an SEC-registered investment adviser that specializes in providing quality investment management services to institutions and wealthy individuals. The firm supervises domestic growth equities, with products focusing on each segment of the capitalization spectrum. Its investment professionals employ a disciplined fundamental approach to research, yet the investment process is designed to be flexible and responsive to changes and opportunities in the market.
- Westfield favors investing in earnings growth stocks given its conviction that stock prices follow earnings progress and that growth stocks offer the best opportunity for superior real rates of return, and believes that reasonably priced stocks of companies with high earnings potential are best identified through in-depth, fundamental research.
- Westfield believes its experience, extensive research, and first-hand knowledge of company operations derived through on-site visits and meetings with management provide a competitive edge. They utilize a team approach within a disciplined investment process that is designed to enable its team of career analysts to impact portfolios. Westfield believes constant analysis and measurement of its investment process permits continual improvement to its approach to asset management.

### What are Fund's investment objectives?

- The Fund seeks long-term capital growth primarily through investment in domestic large cap growth stocks.

### How do I invest in the Fund?

- To determine if this Fund is an appropriate investment for you, carefully consider the Fund's investment objectives, risk factors, charges, and expenses before investing. This and other information can be found in the Fund's prospectus, which may be obtained by calling 1-866-454-0738 to speak with a DST Customer Service Representative.
- Applications are available on the Westfield Capital website:  
[http://www.westfieldcapital.com/Investment\\_Solutions/Large\\_Cap\\_Growth\\_Fund](http://www.westfieldcapital.com/Investment_Solutions/Large_Cap_Growth_Fund)

### How do I add, redeem?

- For direct shareholders, call 1-866-454-0738, and press option 3 to connect with a DST Customer Service Representative.
- For shareholders using an intermediary, contact your investment advisor.

### What is my account number?

- For direct shareholders, please call 1-866-454-0738, and press option 3 to connect with a DST Customer Service Representative.
- Account information is also available on client statements, which are mailed monthly.
- For shareholders using an intermediary, please check with your investment advisor.



**Are we able to receive electronic statements? Or is it only hard copies?**

- Currently, for shareholders invested directly with the Fund, only hard copies are available. An electronic solution is currently being evaluated.

**Where can I find the Fund's Net Asset Value (NAV)?**

- The prior close's NAV can be found on the Westfield Capital website:  
[http://www.westfieldcapital.com/Investment\\_Solutions/Large\\_Cap\\_Growth\\_Fund](http://www.westfieldcapital.com/Investment_Solutions/Large_Cap_Growth_Fund)
- Also, by calling 1-866-454-0738, and press option 2 to connect with a DST Customer Service Representative.

**How do I see my performance?**

- For the performance of the Fund please visit the Westfield Capital website:  
[http://www.westfieldcapital.com/Investment\\_Solutions/Large\\_Cap\\_Growth\\_Fund](http://www.westfieldcapital.com/Investment_Solutions/Large_Cap_Growth_Fund)
- Or, contact 1-866-454-0738, and press option 2 to connect with a DST Customer Service Representative.
- For shareholders using an intermediary, please check with your investment advisor.

**Where can I find the Fund's holdings?**

- Complete holdings are available as of month end with a 10 day lag on the Westfield Capital website:  
[http://www.westfieldcapital.com/Investment\\_Solutions/Large\\_Cap\\_Growth\\_Fund](http://www.westfieldcapital.com/Investment_Solutions/Large_Cap_Growth_Fund)
- Also, by calling 1-866-454-0738, and press option 2 to connect with a DST Customer Service Representative.

**Where can I find the prospectus, annual report, etc.?**

- The complete prospectus is available on the Westfield Capital website:  
[http://www.westfieldcapital.com/Investment\\_Solutions/Large\\_Cap\\_Growth\\_Fund](http://www.westfieldcapital.com/Investment_Solutions/Large_Cap_Growth_Fund)
- Additionally, the Fund's prospectus may be obtained by calling the Fund's distributor at 1-866-454-0738.

**For further information please call 1-866-454-0738 between the hours of 8:30 AM – 6:30 PM ET**

**Or write to us at:**

Westfield Capital Large Cap Growth Fund, c/o DST Systems, Inc.  
430 West 7th Street Kansas City, Missouri 64105

Mutual fund investing involves risk, including possible loss of principal. There can be no assurance that the fund will achieve its stated objectives. The Westfield Capital Large Cap Growth Fund is distributed by SEI Investments Distribution Co., which is not affiliated with Westfield Capital or any of its affiliates. The Westfield Capital Large Cap Growth Fund is available to U.S. investors only.

**To determine if this Fund is an appropriate investment for you, carefully consider the Fund's investment objectives, risk factors, charges, and expenses before investing. This and other information can be found in the Fund's prospectus, which may be obtained by calling 1-866-454-0738. Read the prospectus carefully before investing or sending money.**