WESTFIELD
CAPITAL MANAGEMENT

September 30, 2018

FIRM OVERVIEW

- **WESTFIELD CAPITAL MANAGEMENT COMPANY, L.P.** is a U.S.-based investment advisor dedicated to providing quality investment management services to institutions and wealthy individuals.
- Our Investment Team, comprised of career sector analysts, utilizes an in-depth, fundamental research process, managing U.S. growth equity products across the market capitalization spectrum.
- Employee ownership and continuity of senior management (avg. tenure > 14 years) ensure the long-term stability of the firm and align our interests with those of our clients.

QUICK FACTS

Assets Under Management: $14.6B
Number of Employees: 65
Investment Philosophy: GARP
Asset Class Focus: U.S. growth equity
Year Founded: 1989
Ownership: Employee owned

PHILOSOPHY & APPROACH

- Westfield employs a growth at a reasonable price (GARP) investment style favoring investments in companies with underappreciated earnings growth trading at reasonable valuations based on our belief that:
  1. Stock prices ultimately follow earnings growth, and;
  2. Fundamental research best identifies inefficiencies and investment opportunities.
- We utilize a team approach within a disciplined investment process that enables our analysts to impact portfolios.
- Our Investment Team's experience, extensive research, and first-hand knowledge of company operations derived through on-site visits and meetings with management provide our competitive edge.

INVESTMENT TEAM: Westfield's collaborative team structure is sector focused.

Chief Investment Officer
William A. Muggia - President, CEO & CIO
Market Outlook & Strategy - 34 Years of Experience

Consumer, Business Services & Financials

Ethan J. Meyers, CFA
Director of Research
Business, Financial & Consumer Services
22 Years of Experience

Scott R. Emerman, CFA
Consumer Discretionary
27 Years of Experience

Michael T. Poe
Financials
17 Years of Experience

Rosie Zhang, CFA
Consumer Discretionary
11 Years of Experience

Jehanne E. Hill, CFA
Business, Financial & Consumer Services
6 Years of Experience

Information Technology

Richard D. Lee, CFA
Deputy CIO
Hardware & Semiconductors
24 Years of Experience

Robert T. Flores
Software & Internet
25 Years of Experience

Kevin H. Shin
Information Technology & Real Estate
8 Years of Experience

Nate B. Cunningham
Software & Internet
5 Years of Experience

Energy, Industrials & Materials

D. Hamlen Thompson
Energy & Industrials
24 Years of Experience

William R. Gilchrist
Materials
15 Years of Experience

Edward D. Richardson
Industrials
11 Years of Experience

Samuel D. Ensslin
Industrials, Materials & Energy
8 Years of Experience

Health Care

Bruce N. Jacobs, CFA
Medtech & Consumer Staples
26 Years of Experience

Garth W. Jonson, CFA
Health Services, Big Pharma & Biotechnology - Oncology
24 Years of Experience

Matthew R. Renna
Biotechnology & Pharmaceuticals
14 Years of Experience

Joseph M. Kearney
Health Care
<1 Year of Experience

Portfolio Strategy & Risk Management

John M. Montgomery
Portfolio Strategist & COO
24 Years of Experience

Rajat Babbar, CFA
Risk Manager
20 Years of Experience

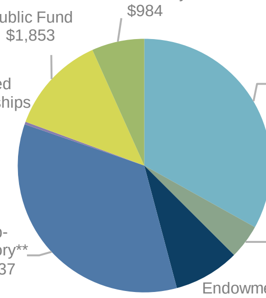
Sustainable Investing

Paul D. McHugh
Director of ESG Research
23 Years of Experience

ASSETS UNDER MANAGEMENT: $14.6 Billion

Strategy	Inception	Assets	Benchmark(s)
Small Cap Growth	Jul-89	$2.1 billion	Russell 2000® Growth
Small/Mid Cap Growth	Apr-92	$2.4 billion	Russell 2500™ Growth
Mid Cap Growth	Jul-94	$2.6 billion	Russell Midcap® Growth
Large Cap Growth	Jul-89	$5.2 billion	Russell 1000® Growth
All Cap Growth	Jul-89	$1.7 billion†	Russell 3000® Growth
Dividend Growth	Jul-10	$303 million	NASDAQ U.S. Dividend Achievers Select® Index
Select Growth	Jan-14	$227 million	Russell 1000® Growth
Sustainable Growth	Jan-16	$7 million	Russell 1000® Growth

Assets By Client Type
$ millions



*Corporate includes Corporate, Defined Benefit, Defined Contribution and Pension Plans
**Sub-Advisory includes 40 Act Mutual Funds, Commingled Funds, and Wrap Relationships

One Financial Center | Boston, MA 02111 | 617.428.7100 www.westfieldcapital.com

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Important Disclosures

All data contained herein is preliminary as of 9/30/2018. †All Cap Growth Equity strategy AUM also includes All Cap Select strategy assets. Strategies listed above do not represent all strategies managed by Westfield. A full list can be found in Westfield's ADV Part 2A. We have chosen the specified benchmark(s) as they most closely represent our investment strategies. The product's holdings, characteristics and performance may differ substantially from the benchmark.

Supplemental Disclosures: The information provided herein is provided solely as general information about our products and services and to otherwise provide general investment education. No information contained herein should be regarded as a suggestion to engage in or refrain from any investment-related course of action as Westfield is not undertaking to provide investment advice, act as an adviser to any plan or entity subject to the Employee Retirement Income Security Act of 1974, as amended, individual retirement account or individual retirement annuity, or give advice in a fiduciary capacity with respect to the materials presented herein. If you are an individual retirement investor, contact your financial advisor or other fiduciary unrelated to Westfield about whether the product described herein may be appropriate for your circumstances.