WESTFIELD
CAPITAL MANAGEMENT

September 30, 2017

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.
- 100% employee ownership and continuity of senior management (tenure > 10 years) ensures the long-term stability of the firm and aligns our interests with those of our clients.

QUICK FACTS

Assets Under Management: $13.5B
Number of Employees: 63
Investment Philosophy: GARP
Asset Class Focus: U.S. growth equity
Year Founded: 1989
Ownership: 100% 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 - 33 Years of Experience

Consumer, Business Services & Financials

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

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

Michael T. Poe
Financials
16 Years of Experience

Rosie Zhang, CFA
Consumer Discretionary
10 Years of Experience

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

Information Technology

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

Robert T. Flores
Software & Internet
24 Years of Experience

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

Energy, Industrials & Materials

D. Hamlen Thompson
Energy & Industrials
23 Years of Experience

William R. Gilchrist
Materials
14 Years of Experience

Edward D. Richardson
Industrials
10 Years of Experience

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

Health Care

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

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

Matthew R. Renna
Biotechnology & Pharmaceuticals
13 Years of Experience

Portfolio Strategy & Risk Management

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

Rajat Babbar, CFA
Risk Manager
19 Years of Experience

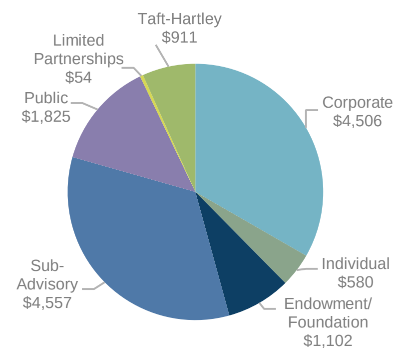
Sustainable Investing

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

ASSETS UNDER MANAGEMENT: $13.5 Billion

Strategy	Inception	Assets	Benchmark(s)
Small Cap Growth Equity	Jul-89	$2.0 billion	Russell 2000® Growth
Small/Mid Cap Growth Equity	Apr-92	$2.3 billion	Russell 2500™ Growth
Mid Cap Growth Equity	Jul-94	$2.0 billion	Russell Midcap® Growth
Large Cap Growth Equity	Jul-89	$4.9 billion	Russell 1000® Growth
All Cap Growth Equity	Jul-89	$1.8 billion†	Russell 3000® Growth
Dividend Growth Equity	Jul-10	$260 million	NASDAQ U.S. Dividend Achievers Select® Index
Select Growth Equity	Jan-14	$187 million	Russell 1000® Growth

Assets By Client Type
$ millions



All data contained herein is current as of 9/30/2017. †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.

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