WESTFIELD
CAPITAL MANAGEMENT

June 30, 2024

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 > 15 years) ensure the long-term stability of the firm and align our interests with those of our clients.

QUICK FACTS

Assets Under Management: $20.9B
Number of Employees: 62
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.

Will Muggia – President, CEO & CIO
Market Outlook & Strategy (40)

Sector Teams: Consumer & Financials	Sector Teams: Semis & Cyclicals	Sector Teams: Software & Internet	Sector Teams: Health Care	Portfolio Strategy, Risk Management & ESG Research
Ethan Meyers, CFA Director of Research – FinTech & Business Services (28)	**Rich Lee, CFA** CIO – Hardware, Semis & IT Services (30)	**Rob Flores** Software & Internet (31)	**Matt Renna** Biopharma, Life Sciences & Tools (20)	**Rajat Babbar, CFA** Head of Portfolio Strategy/Risk Management (26)
Scott Emerman, CFA Consumer Discretionary & Staples (33)	**Sam Ensslin** Industrials, Materials, Energy (14)	**Nate Cunningham** Software (11)	**Garth Jonson, CFA** Health Services, Medical Technology, Oncology (30)	**John Montgomery** COO (29)
Mike Poe Financials (23)	**Kevin Shin** Media, Telecom, Real Estate (14)	**Jehanne Reed, CFA** Research Analyst (12)	**Joe Kearney** Health Care (6)	**Paul McHugh** Director of ESG Research (29)
Ted Richardson A&D, Building Products, Residential Construction & Restaurants (17)	**Yushu Han** Research Analyst (6)	**Pete Kendall** Research Analyst (1)		**William Gilchrist** Portfolio Analyst (21)
Amanda Schoewe Research Analyst (5)	**Marissa Guzzo** Research Analyst (2)			

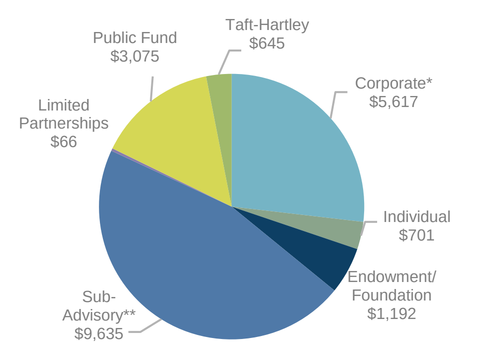
(Years of Experience)

ASSETS UNDER MANAGEMENT: $20.9 Billion

Strategy	Inception	Assets	Benchmark(s)
Small Cap Growth	Jul-89	$3.4 billion	Russell 2000® Growth
Small/Mid Cap Growth	Apr-92	$4.0 billion	Russell 2500™ Growth
Mid Cap Growth	Jul-94	$3.7 billion	Russell Midcap® Growth
Large Cap Growth	Jul-89	$4.6 billion	Russell 1000® Growth
All Cap Growth	Jul-89	$1.7 billion	Russell 3000® Growth
Dividend Growth	Jul-10	$451 million	NASDAQ U.S. Dividend Achievers Select® Index
Select Growth	Jan-14	$2,560 million	Russell 1000® Growth
Sustainable Growth	Jan-16	$86 million	Russell 1000® Growth
Other*	--	$53 million	--
IMA**	--	$396 million	--

*Other represents more recently launched strategies and non-marketed strategies
**IMA (Individually Managed Accounts) represents legacy High Net Worth clients separately managed accounts managed by Westfield's CIO

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.

Important Disclosures

All data contained herein is preliminary as of 6/30/2024.. 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.