

Form CRS – Client Relationship Summary

Item 1: Introduction

Westfield Capital Management Company, L.P. (“Westfield”), is an investment adviser registered with the U.S. Securities and Exchange Commission. It is important for you to understand that the services provided, and fees charged by investment advisory and brokerage firms differ. There are free and simple tools available to research firms and financial professionals at www.investor.gov/CRS which also provides educational materials about investment advisers, broker-dealers and investing.

Item 2: Relationships and Services

“What investment services and advice can you provide me?”

Westfield offers its investment advisory services to retail and institutional investors. Our principal advisory service is portfolio management. We participate in wrap fee programs as a sub-advisor to sponsors which are broker-dealers. We also provide a model to unified managed programs sponsored by unaffiliated third parties, but we do not have trading discretion on these programs. We offer equity investment strategies that are managed either by a team or by an individual portfolio manager. Accounts are managed on a discretionary basis which means we don’t need to contact you to buy or sell a security in your account. As part of our standard services, we review your investment portfolio monthly or more often if needed. The minimum investment amount to open an account differs for each investment strategy and each wrap-fee program and is subject to the discretion of Westfield. You will sign an investment management agreement giving us this authority. This agreement will remain in place until you or we terminate the relationship. Additional information about our advisory services, investment strategies and account minimums are located on page 2 in our Form ADV Part 2A, which is available online at www.westfieldcapital.com.

Questions to Ask Us:

- Given my financial situation, should I choose an investment advisory service? Why or why not?
- How will you choose investments to recommend to me?
- What is your relevant experience, including your licenses, education and other qualifications? What do those qualifications mean?

Item 3: Fees, Costs, Conflicts, and Standard of Conduct

“What fees and costs will I pay?”

Fees for Direct Clients: Westfield offers standard investment management fee schedules. The standard fee rates are tiered by asset size and will also vary based on the investment strategy selected by the client. We also enter into performance fee arrangements with qualified clients. Fees are changed based on what is established in a client’s written agreement. Fees can be changed or negotiated subject to Westfield’s discretion. Fees are typically billed on a quarterly basis in arrears based on the total market value of the account on the last business day of the quarter or based on the performance of the account.

Fees for Wrap Fee Programs: Sponsor firms set the fees for clients in their program. Fees are based on assets under management and will include most transactions costs and fees to a broker-dealer or bank that has custody of these assets, and therefore are higher than a typical asset-based advisory fee. However, if we trade away from the Sponsor Firms (also known as step-out transactions), the commissions or other fees for these trades are in addition to the wrap fee. As compensation for our wrap fee services, we receive directly from each sponsor a portion of the all-inclusive fee that each client pays each sponsor.

Fees for UMA Programs: Sponsor firms set the fees for clients in their program. As compensation for our wrap fee services, we receive directly from each sponsor a portion of the all-inclusive fee that each client pays each sponsor.

Other Fees and Costs: Some investments, such as mutual funds, impose additional fees that will reduce the value of your investments over time. You may also pay other fees, such as brokerage commissions or mark-ups, custodian fees and account maintenance fees.

You will pay fees and costs whether you make or lose money on your investments. Fees and costs will reduce any amount of money you make on your investments over time. Please make sure you understand what fees and costs you are

paying. Because we charge an asset-based fee, the total fees you pay us will increase with the size of your account. This creates an incentive for us to recommend that you increase the assets in your account.

More detailed information regarding fees and costs is located on page 3 in our ADV Part 2A, which is available online at www.westfieldcapital.com.

Questions to Ask Us:

- Help me understand how these fees and costs will affect my investments. If I give you \$10,000 to invest, how much will go to fees and costs and how much will be invested for me?
- How do you determine what fee I will be charged?

What are your legal obligations to me when acting as my investment adviser and what conflicts of interest do you have?

When we act as your investment adviser, we have to act in your best interest and not put our interest ahead of yours. At the same time, the way we make money creates certain conflicts with your interests. You should understand and ask us about these conflicts because they can affect the investment advice we provide you. Here are some examples to help you understand what this means:

Westfield serves as manager to the General Partners of private funds, for which we also provide investment advisory services. Westfield and its employees have also invested their own funds in such vehicles and other investment strategies that are advised by the firm. Allowing such investments and having a financial interest in the private funds can create an incentive for the firm to favor these accounts because our financial interests are more directly tied to the performance of such accounts.

Performance-based fee arrangements may create an incentive for Westfield to recommend investments that may be riskier or more speculative than those which would be recommended under a different fee arrangement. Such fee arrangements also create an incentive to favor higher fee paying accounts over other accounts in the allocation of investment opportunities.

Questions to Ask Us:

- How might your conflicts of interest affect me and how will you address them?

“How do your financial professionals make money?”

Primarily, we and our financial professionals’ benefit from the advisory services we provide to you because of the advisory fees we receive from you.

Employees of the Marketing and Client Service Department are compensated on client service efforts and new business generation. The compensation structure includes commissions based on a percentage of annual revenue generated by new accounts and/or significant contributions to existing client accounts but excludes any sub-advised or advised mutual funds. This incentive poses a conflict in that members of the team could encourage investment in a product(s) that may not be suitable.

Item 4: Disciplinary

“Do you or your financial professionals have legal or disciplinary history?”

No, our firm and/or financial professionals do not have any legal or disciplinary history. Visit Investor.gov/CRS for a free and simple search tool to research our firm and our financial professionals.

Questions to Ask Us:

- “As a financial professional, do you have any disciplinary history? For what type of conduct?”

Item 5: Additional Information

You can find additional information about our firm’s investment advisory services on the SEC’s website at www.adviserinfo.sec.gov by searching CRD # 146990. To request up-to-date information or a copy of the relationship summary, you may contact our firm at (617) 428-7100 and talk to any one of our investment professionals or support staff.

Questions to Ask Us:

- Who is my primary contact person?
- Who can I talk to if I have concerns about how this person is treating me?