



About the Westwood WealthCoach Team

Our Asset Allocation Committee Voting Members take advice and insight from both internal and external sources. NEPC provides a third-party perspective. Internally, we have a strong bench of support for the voting members.

Our internal Asset Allocation Committee Members have long investment tenure and represent investment teams focused on Multi-Asset, U.S. Value and Emerging Markets strategies as well as Global Convertible Securities.

To ensure investment strength and stability, our Investment Fund Selection Committee convenes to review fund options and make decisions. NEPC provides a third-party perspective.

Asset Allocation Committee Voting Members



Susan Byrne
Founder and Vice Chairman of the Board

Susan founded Westwood Management Corp. in 1983. She is President and Chief Investment Officer of MB Capital and MOB Family Foundation.



Carol Proffer
Partner at Capstone Partners, LP

Carol is a member of the Westwood Trust Board and has been at Capstone Partners for 13 years.



Pat Frazee
Westwood Trust Board Member

Pat joined Westwood in 1990 and retired in 2014 from her post as Executive Vice President.



Asset Allocation Committee Contributors



Leah Bennett, CFA
President, Westwood Trust – Houston

Leah joined Westwood in 2016 and has over 25 years of experience in the industry.



David Clott, CFA
Senior Vice President, Senior Portfolio Manager, Westwood Management

Dave joined Westwood Management in 2014 and has over 25 years of experience in the industry.



Parker Young
Vice President, Portfolio Manager, Westwood Management

Parker joined Westwood Management in 2013 and has over 10 years of experience in the industry.



Patricia Perez-Coutts, CFA
Senior Vice President, Portfolio Manager, Westwood International Advisors

Patricia joined Westwood International Advisors in 2012 and has over 30 years of experience in the industry.



Kellie Stark, FRM, CFA
Executive Vice President, Risk and Performance Analytics

Kellie joined Westwood Management in 1992 and has nearly 30 years of experience in the industry.



Investment Fund Selection Committee



Nick English

Vice President, Westwood Wealth Management

Nick joined Westwood Management in 2006 and has 20 years of experience in the industry.



Porter Montgomery

President, Westwood Trust – Dallas

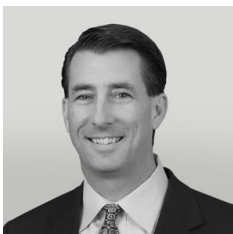
Porter joined Westwood Management in 2003 and has 19 years of experience in the industry.



Gregg Ballew, CFA

Senior Vice President, Westwood Trust – Dallas

Gregg joined Westwood in 2010 and has over 35 years of experience in the industry.



C.J. MacDonald, CFA

Senior Vice President, Portfolio Manager – Dallas

C.J. joined Westwood in 1994 and has over 28 years of experience in the industry.



Allen Lewis, CFA

Vice President, Westwood Trust – Houston

Allen joined Westwood in 2006 and has 12 years of experience in the industry.

