



## 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.

