



About the Westwood WealthCoach Team

Our Strategic 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 strategies as well as Global Convertible Securities.

To ensure investment strength and stability, our Investment Oversight 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



Carol Proffer
Partner at Capstone Partners, LP



Pat Frazee
Westwood Trust Board Member



Adrian Helfert
Senior Vice President
Director - Multi-Asset and Emerging Market Portfolios



Leah R. Bennett, CFA[®]
President
Westwood Wealth Management – Houston

Asset Allocation Committee Contributors



David Clott, CFA[®]
Senior Vice President
Senior Portfolio Manager



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

Investment Oversight Committee



J. Porter Montgomery
President
Westwood Wealth
Management – Dallas



Kallie Myers, JD
Senior Vice President
Chief Fiduciary Officer



**Jacqueline Finley,
CFA®**
Senior Vice President
Wealth and Investment
Advisor



Marty Brainerd
Senior Vice President
Private Wealth Advisor



Maria Asher, CFA®
Associate Vice President
Portfolio Manager



Daniel Pinard
Associate Vice President
Portfolio Manager



Danyell Ackerman
Associate Vice President
Senior Trade Specialist