

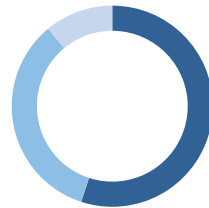
Enhanced Balanced

Moderately Aggressive (10- to 20-Year Time Horizon)

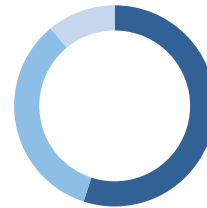
Objective

Designed for investors looking for a balanced allocation approach with an estimated time horizon of 10 to 20 years. The objective of this strategy is to provide participation in up markets the while aiming to limit losses in down markets. Investors in this strategy are concerned with balancing the opportunity for capital appreciation while attempting to minimize volatility. This allocation is actively managed and we will make changes to the asset class weightings over time. The anticipated investment ranges for this allocation are: Stocks: 40% - 60%; Bonds: 40% - 60%.

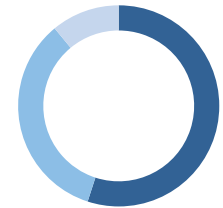
Allocation Details



Index Allocation



Hybrid Allocation



Active Allocation

| Asset Class | Fund Ticker | Index | Fund Ticker | Hybrid | Fund Ticker | Active |
|---|-------------|--------------|-------------|--------------|-------------|--------------|
| LargeCap | IVV | 9% | IVV | 9% | POSKX | 9% |
| MidCap | IJH | 5% | IJH | 5% | VASVX | 5% |
| SmallCap | IJR | 6% | VSTCX | 6% | VSTCX | 6% |
| AllCap Growth | VUG | 15% | VUG | 15% | MFEIX | 15% |
| Total Domestic Stock | | 35% | | 35% | | 35% |
| International Equity | VEA | 14% | VEA | 14% | OAKIX | 14% |
| Emerging Markets | VWO | 6% | BEXIX | 6% | BEXIX | 6% |
| Total International Stock | | 20% | | 20% | | 20% |
| Investment Grade Bonds | AGG | 23% | BCOIX | 23% | BCOIX | 23% |
| International Bonds | BNDX | 5% | LWOIX | 5% | LWOIX | 5% |
| High Yield Bonds | SHYG | 5% | SHYG | 5% | EIHIX | 5% |
| Total Bonds | | 33% | | 33% | | 33% |
| Convertibles | CWB | 5% | CWB | 5% | FCSZX | 5% |
| MLP & Energy | AMLPE | 3% | TORIX | 3% | TORIX | 3% |
| REIT | VNQ | 3% | VNQ | 3% | CSDIX | 3% |
| Total Specialty | | 11% | | 11% | | 11% |
| Cash / Money Market | Cash | 1% | Cash | 1% | Cash | 1% |
| TOTAL | | 100% | | 100% | | 100% |
| Blended Fee Rate with 0.60% Advisory Fee | | 0.74% | | 0.89% | | 1.24% |

| Full Name | Fund Ticker | Asset Class |
|--|-------------|------------------------|
| iShares Core S&P 500 Index | IVV | LargeCap |
| PRIMECAP Odyssey Stock | POSKX | LargeCap |
| iShares Core S&P Mid-Cap Index | IJH | MidCap |
| Vanguard Selected Value Fund | VASVX | MidCap |
| iShares Core S&P Small-Cap Index | IJR | SmallCap |
| Vanguard Strategic Small-Cap Equity Fund | VSTCX | SmallCap |
| Vanguard US Growth Index | VUG | AllCap Growth |
| MFS Growth Fund | MFEIX | AllCap Growth |
| Vanguard FTSE Developed Markets Index | VEA | International Equity |
| Oakmark International Fund | OAKIX | International Equity |
| Vanguard Emerging Market Stock Index | VWO | Emerging Markets |
| Baron Emerging Markets Institutional | BEXIX | Emerging Markets |
| iShares Core Aggregate Bond Index | AGG | Investment Grade Bonds |
| Baird Core Plus Bond | BCOIX | Investment Grade Bonds |
| Vanguard Total International Bond Index | BNDX | International Bonds |
| Brandywine International Bonds | LWOIX | International Bonds |
| Eaton Vance High Income Opportunities Fund | EIHIX | High Yield Bonds |
| iShares 0-5 Year High Yield Bond Index | SHYG | High Yield Bonds |
| SPDR Bloomberg Barclays Convertible Bond Index | CWB | Convertibles |
| Franklin Convertible Securities Fund | FCSZX | Convertibles |
| Alerian MLP Index | AMLPL | MLP & Energy |
| Tortoise MLP & Pipeline Instl | TORIX | MLP & Energy |
| Vanguard REIT Index | VNQ | REIT |
| Cohen & Steers Real Estate Securities Fund | CSDIX | REIT |

This table shows (1) the asset class weights as percentages of the overall portfolio for the Balanced Growth Allocation Model and (2) the corresponding funds for each asset class in each of the three investment strategy types available in the Westwood WealthCoach Program sponsored by Westwood Advisors, L.L.C. This information is as of the date indicated in the upper right. On a quarterly basis, WealthCoach Allocation Models are reviewed by the Westwood Wealth Management Allocation Committee and funds for each asset class are reviewed by the Westwood Wealth Management Fund Selection Committee. These committees may change the weights or funds or both. Funds indicated in bold are in the Westwood Funds family of mutual funds for which Westwood Management Corp., an affiliate of Westwood Advisors, L.L.C., is the investment manager and from which it receives investment management fees. Please see the Westwood WealthCoach Program Brochure for additional information. The Blended Fee Rate shows the effective percentage that results from applying the WealthCoach advisory fee of 0.60% applicable to assets in a WealthCoach account other than affiliated funds blended with the proportionate expense ratio for the funds based on publicly available information about each fund's fees and expenses. The Blended Fee Rate provides an estimate of the total asset-based fees at both the fund level and at the account level. The actual amount of total fees will vary due to differences in calculation methodology and as the funds in account change in value over time. More information about the advisory fees in the WealthCoach Program is available in the WealthCoach Program Brochure. Additional information about fund fees and expenses is available in the prospectus of each fund.