

Rod Westmoreland's Team

A Leading Broker at Merrill
Lynch

Tiburon Written Research
February 2, 2019



TIBURON STRATEGIC ADVISORS

Industry Leading Think Tank, Advisor, and Investor in
Wealth & Investment Management (& WealthTech) Firms

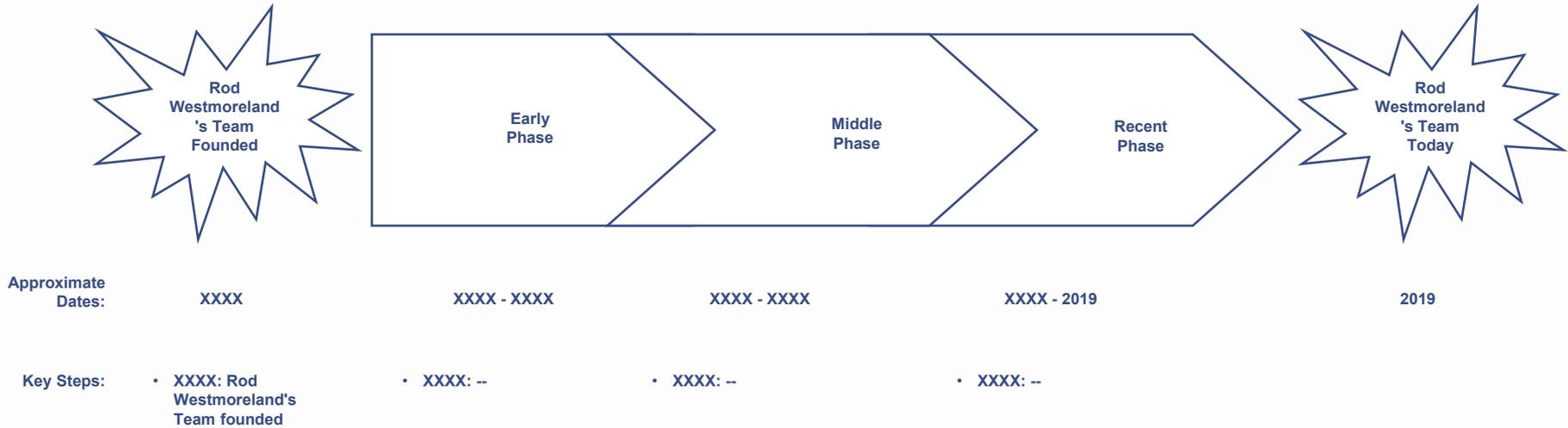
Comments

- **Founded in XXXX**
- **Based in XXXX**



Rod Westmoreland's Team was Founded in XXXX and Has Subsequently Evolved through its Early, Middle, & Recent Phases

Rod Westmoreland's Team History



Rod Westmoreland's Team was Founded in XXXX

Comments

- **Founded in XXXX**
- **Based in XXXX**



Rod Westmoreland's Team is Not a Frequent Advertiser

Advertising

Comments

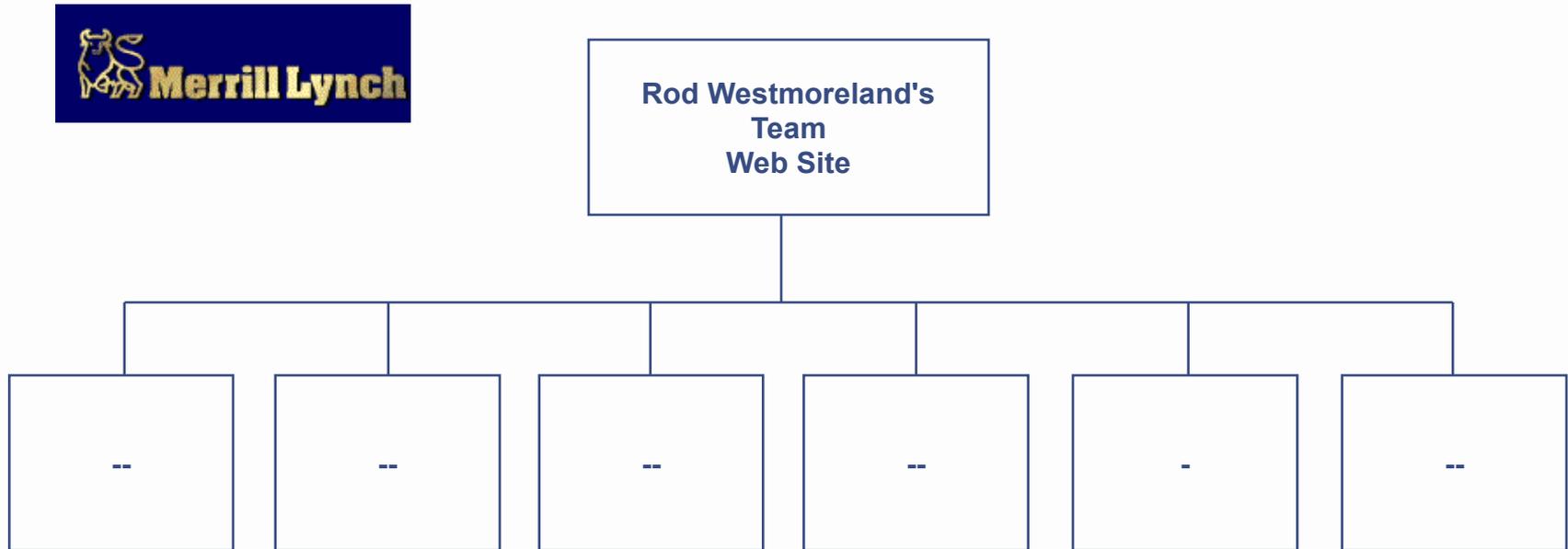
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Source: Tiburon Research & Analysis

Rod Westmoreland's Team Has a Web Site with XXXX Core Sections, Including _____

Rod Westmoreland's Team Web Site



Rod Westmoreland's Team Has a Charitable Giving Program

Charitable Giving

Comments

- --



Source: Tiburon Research & Analysis

Rod Westmoreland's Team is Not a Frequent Acquirer

Acquisitions

Comments

- --



Source: Tiburon Research & Analysis

Rod Westmoreland's Team Employees



Rod Westmoreland's Team Serves Clients

Needs data

Rod Westmoreland's Team Clients



Source: Tiburon Research & Analysis

Rod Westmoreland's Team Has Gathered Accounts

Needs data

Rod Westmoreland's Team Accounts



Source: Tiburon Research & Analysis

Rod Westmoreland's Team Has an \$___ Average Account Size

Needs data

Rod Westmoreland's Team Average Account Size



Rod Westmoreland's Team Has Gathered Assets Under Administration

Needs data

Rod Westmoreland's Team Assets Under Administration (\$ Millions)



Rod Westmoreland's Team Generates Revenues

Needs data

Rod Westmoreland's Team Revenues (\$ Millions)



Source: Tiburon Research & Analysis

Rod Westmoreland's Team Earns \$___ Million

Needs data

Rod Westmoreland's Team Net Profits (\$ Millions)



2017

2018

Rod Westmoreland's Team's First Service is ____

Comments

- --



Rod Westmoreland's Team's Second Service is ____

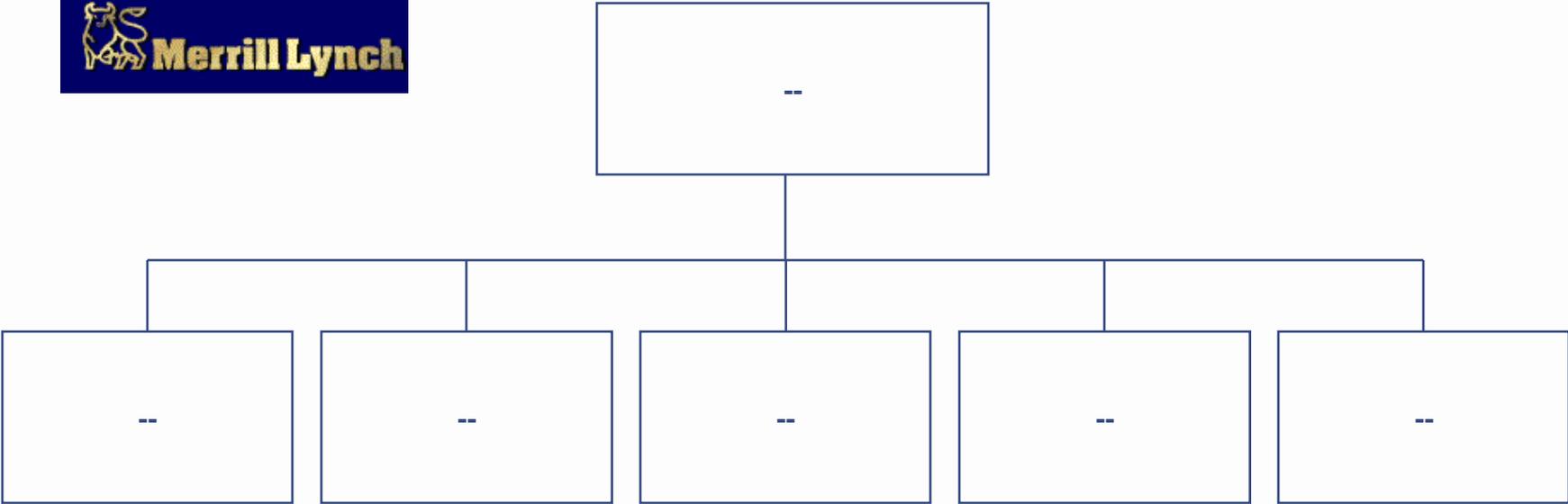
Comments

- --



Rod Westmoreland's Team is Led by ...

Rod Westmoreland's Team Organizational Chart



Source: Tiburon Research & Analysis

Rod Westmoreland's Team Has a Board of Directors Led by its Chairman...

Rod Westmoreland's Team Board of Directors

--	--	--	--	--
• --	• --	• --	• --	• -- 

Rod Westmoreland's Team is Privately Owned

Comments

- --



Rod Westmoreland's Team Has Assets

Needs data

Rod Westmoreland's Team Assets (\$ Millions)



2017 2018

Source: Tiburon Research & Analysis

Rod Westmoreland's Team Has Liabilities

Needs data

Rod Westmoreland's Team Liabilities (\$ Millions)



2017 2018

Source: Tiburon Research & Analysis

Rod Westmoreland's Team Has Shareholders' Equity

Needs data

Rod Westmoreland's Team Shareholders Equity (\$ Millions)



2017 2018

Source: Tiburon Research & Analysis

Rod Westmoreland's Team Earns ... Per Share

Needs data

Rod Westmoreland's Team Earnings Per Share



2017

2018

Rod Westmoreland's Team Declares ... Dividends Per Share

Needs data

Rod Westmoreland's Team Dividends Per Share



2017

2018

Needs data

Rod Westmoreland's Team Dividend Yield



Needs data

Rod Westmoreland's Team Stock Price



Rod Westmoreland's Team Has ... Shares Outstanding

Needs data

Rod Westmoreland's Team Shares Outstanding



2017

2018

Rod Westmoreland's Team's Market Capitalization is ...

Needs data

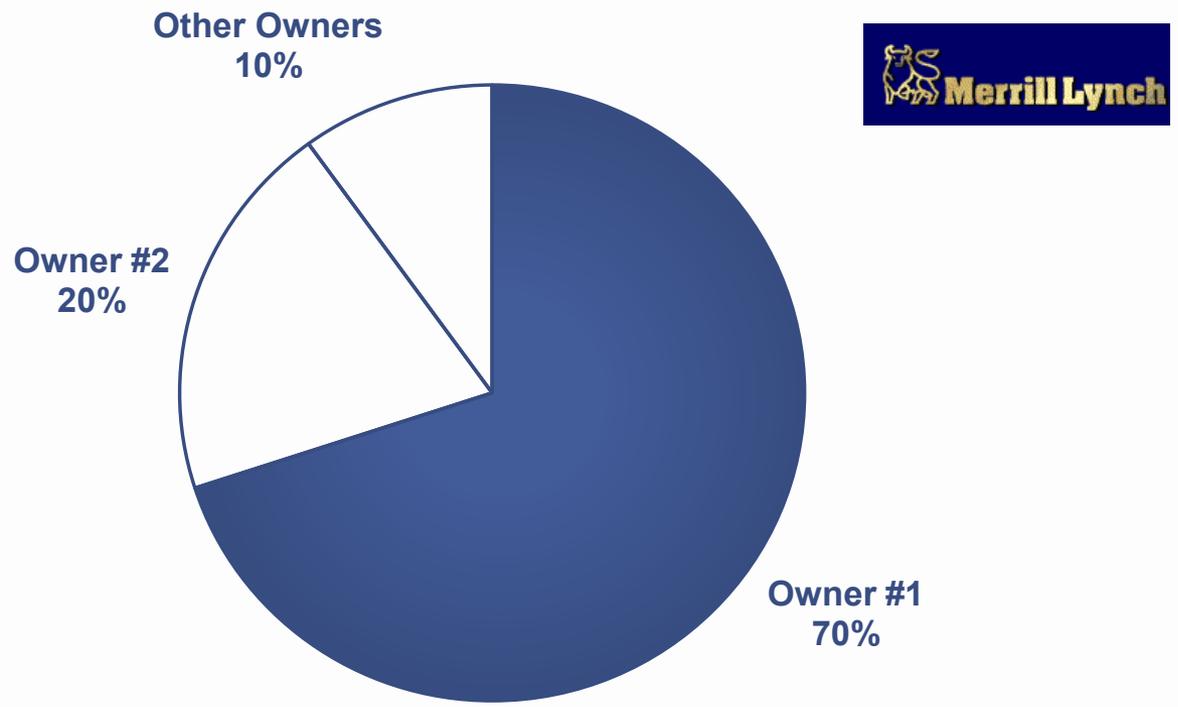
Rod Westmoreland's Team Market Capitalization (\$ Millions)



Source: Tiburon Research & Analysis

Needs data

**Rod Westmoreland's Team
Ownership
By Owner**



Source: Tiburon Research & Analysis

Rod Westmoreland's Team's Stock Volume is....

Needs data

Rod Westmoreland's Team Stock Volume



2017

2018



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