

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

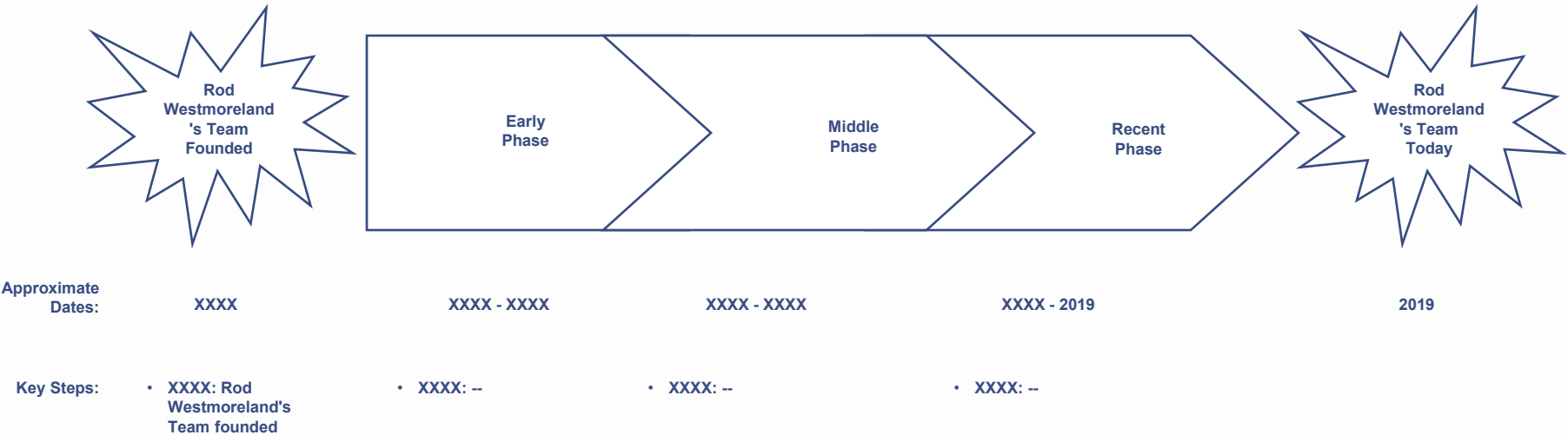


Comments
• Founded in XXXX • Based in XXXX

Source: Tiburon Research & Analysis

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

Rod Westmoreland's Team History



Source: Tiburon Research & Analysis

Rod Westmoreland's Team was Founded in XXXX



Comments
• Founded in XXXX • Based in XXXX

Source: Tiburon Research & Analysis

Rod Westmoreland's Team is Not a Frequent Advertiser

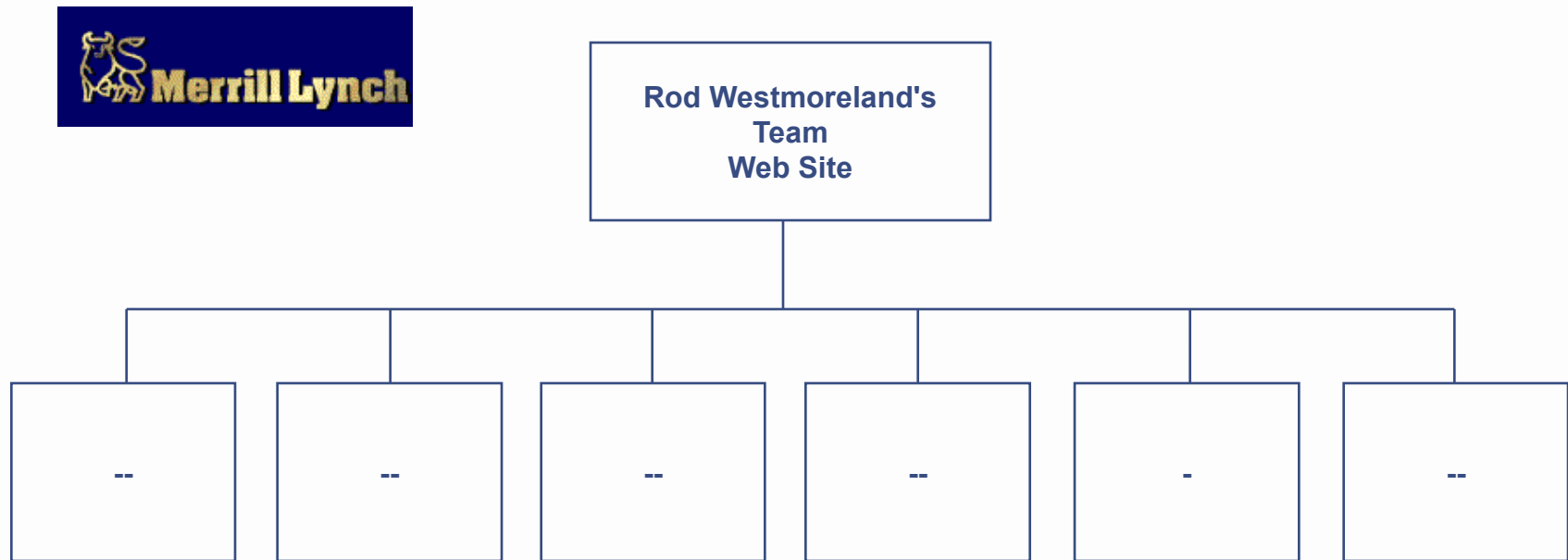


Comments	
•	--

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



Comments
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Source: Tiburon Research & Analysis

Rod Westmoreland's Team is Not a Frequent Acquirer



Comments
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Source: Tiburon Research & Analysis

**Rod Westmoreland's Team
Employees**



Source: Tiburon Research & Analysis

Rod Westmoreland's Team
Clients



Source: Tiburon Research & Analysis

**Rod Westmoreland's Team
Accounts**



Source: Tiburon Research & Analysis

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

**Rod Westmoreland's Team
Average Account Size**



Source: Tiburon Research & Analysis

Rod Westmoreland's Team Has Gathered Assets Under Administration

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



Rod Westmoreland's Team
Revenues
(\$ Millions)



Source: Tiburon Research & Analysis

Rod Westmoreland's Team Earns \$___ Million

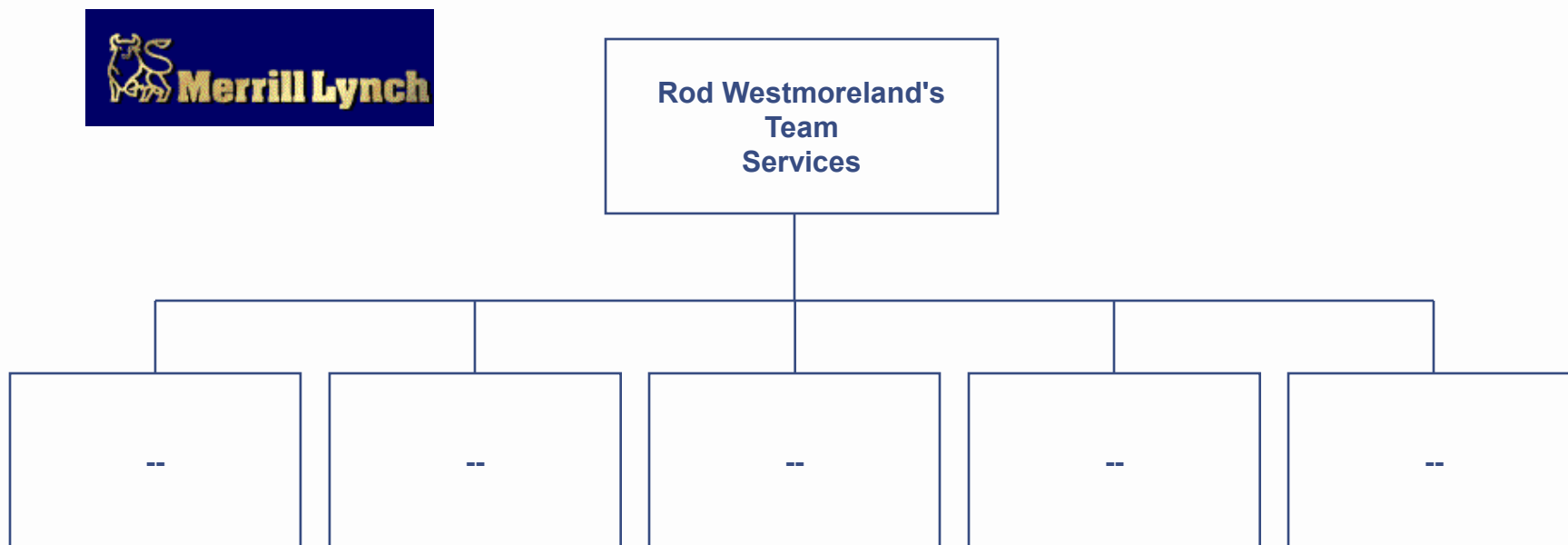
**Rod Westmoreland's Team
Net Profits
(\$ Millions)**



Source: Tiburon Research & Analysis

Rod Westmoreland's Team Provides a Number of Services, Including...

Rod Westmoreland's Team Services



Rod Westmoreland's Team's First Service is ____

Comments

- --



Source: Tiburon Research & Analysis

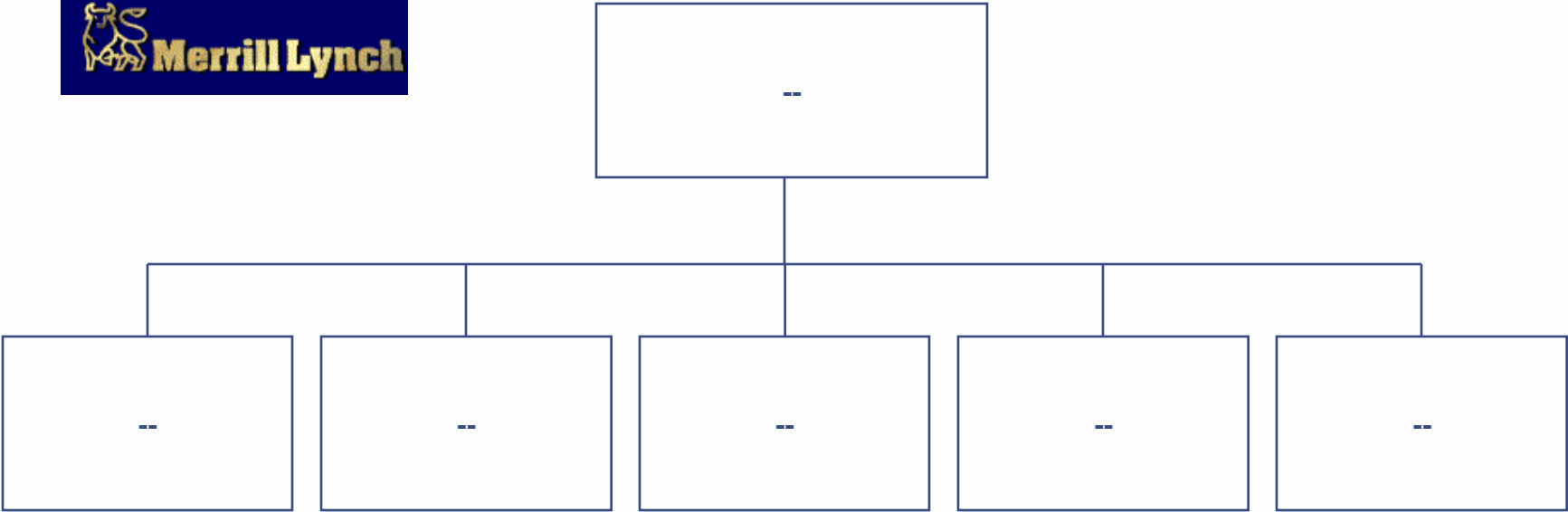
Rod Westmoreland's Team's Second Service is ____



Comments	
•	--

Source: Tiburon Research & Analysis

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**

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

Source: Tiburon Research & Analysis



Comments	
•	--

Rod Westmoreland's Team
Assets
(\$ Millions)



Source: Tiburon Research & Analysis

**Rod Westmoreland's Team
Liabilities
(\$ Millions)**



Source: Tiburon Research & Analysis

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



Source: Tiburon Research & Analysis

**Rod Westmoreland's Team
Earnings Per Share**



Source: Tiburon Research & Analysis

**Rod Westmoreland's Team
Dividends Per Share**



**Rod Westmoreland's Team
Dividend Yield**



Source: Tiburon Research & Analysis

**Rod Westmoreland's Team
Stock Price**



Source: Tiburon Research & Analysis

Rod Westmoreland's Team
Shares Outstanding



Source: Tiburon Research & Analysis

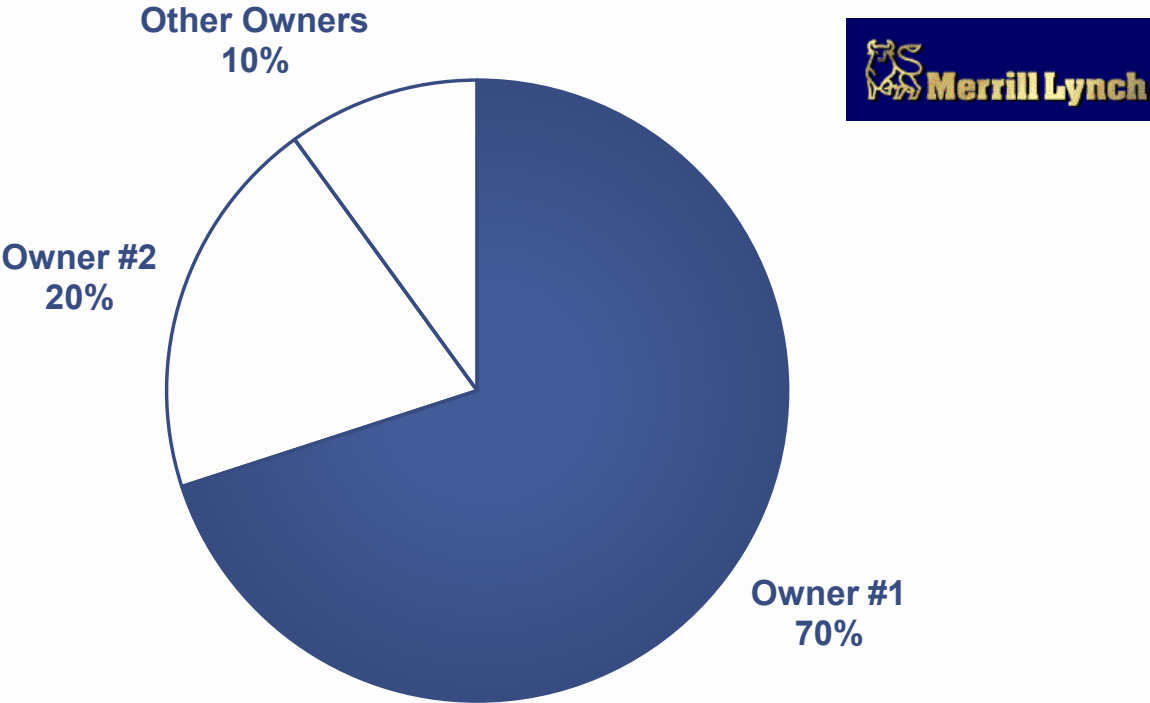
**Rod Westmoreland's Team
Market Capitalization
(\$ Millions)**



Source: Tiburon Research & Analysis

Rod Westmoreland's Team is Owned by

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



Source: Tiburon Research & Analysis

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

**Rod Westmoreland's Team
Stock Volume**



Source: Tiburon Research & Analysis



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