

Frequently Asked Questions

How and when will I get my statements? Can I get a copy in the mail or an electronic copy?

- Statements will continue to be delivered to you as they are now, either by U.S. Mail or online, or both. If you would like to change how you are receiving statements, please contact your relationship manager.

Will I be able to see my account online like I do today? Will I login to the same website as I do now? When will I get new instructions?

- You will still be able to view your account online. Please update your bookmarks or visit the Client Access section of the Westwood website (<http://westwoodgroup.com/our-firm/client-access/>).

What if I forget my Access ID / password?

- There are safeguards in place to provide assistance if you need to change your Access ID / password or if you forget either of these codes.

Is my statement's format going to change? What will it look like?

- Our statement format will change somewhat, but will contain the same basic type of information as before. A sample statement (or an example of the new statement) is available upon request from your relationship manager.

Do I have to sign any new forms or paperwork because of this new system?

- No. In order to access accounts online, you will need to read and accept an online user agreement for the system.