



**Form ADV Part 2B  
Brochure Supplement**

**Westwood Management Corp.**  
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**Dallas, Texas 75201**  
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Item 1 – Cover Page

This Part 2B of Form ADV (the “Brochure Supplement”) provides information about the following individuals who provide advisory services to Westwood Management Corp. clients, and it supplements the Westwood Management Corp. Brochure (i.e. Part 2A of Form ADV), which you should have received with, or prior to, the delivery of this supplement. If you did not receive the Westwood Management Corp. Brochure, or if you have any questions, please contact the Compliance Department at 214-756-6900 or email [complianceapproval@westwoodgroup.com](mailto:complianceapproval@westwoodgroup.com).

Executive:

- Brian Casey

Multi-Asset Team:

- Adrian Helfert
- Scott Barnard
- Ben Chittenden
- Hussein Adatia

## **Brian O. Casey**

### Item 2 – Educational Background and Business Experience

Born 1963

M.B.A., Business, University of Texas, Dallas, Texas (2000)

B.S., Finance, Trinity University, San Antonio, Texas (1985)

Mr. Casey has served Westwood as Chief Executive Officer since January 2006, as President since July 2002, and as Director since January 2000. He served Westwood as Executive Vice President from January 2000 to June 2002, as Chief Operating Officer from July 2000 to January 2006 and as Vice President from June 1992 to January 2000. Since July 1996, he has served as Chairman of the Board of Directors and Chief Executive Officer of Westwood Trust, an affiliated trust company chartered by the Texas Department of Banking. From July 1996 until February 2013, Mr. Casey served as President of Westwood Trust. Since July 1, 2002, he has also served as the President and Chief Executive Officer of Westwood Holdings Group, Inc., an NYSE traded company.

### Item 3 - Disciplinary Information

Mr. Casey has not been involved in any legal or disciplinary events that would be material to a client's or prospective client's evaluation of Mr. Casey or of Westwood; however, Mr. Casey was named as a defendant in the AGF litigation described in Part 2A, which has been settled.

### Item 4 - Other Business Activities

Mr. Casey is not engaged in any other investment-related business other than Westwood Trust, and he does not receive compensation in connection with any business activity outside of Westwood and Westwood Trust. Mr. Casey is not on the investment committee of Westwood and does not make investment-related decisions on behalf of Westwood clients.

### Item 5 - Additional Compensation

Mr. Casey does not receive economic benefits from any person or entity other than Westwood and Westwood Trust in connection with the provision of investment advice to clients.

### Item 6 - Supervision

The Board of Directors is responsible for supervising Mr. Casey's activities on behalf of Westwood and responding to questions concerning Mr. Casey's advisory activities. Randy Bowman, Chairman of the Board, can be reached directly by calling the Dallas office telephone number on the cover of this brochure supplement.

## **Hussein Adatia**

### Item 2 – Educational Background and Business Experience

Born 1983

B.S., Finance, New York University - Stern School of Business, New York City, NY (2005)

Mr. Adatia joined Westwood in 2018 and serves as Senior Vice President, Portfolio Manager, and Research Analyst. He was promoted to Portfolio Manager in 2019. Prior to joining the firm, Mr. Adatia was a Managing Director at Oaklawn Investments from 2016 to 2018, where he focused on researching, identifying, and investing in a range of credit products, including bank loans, bonds, and asset-backed securities. Earlier, he spent 2008 to 2015 at Archview Investment Group as a Senior Investment Analyst on the distressed credit team. Mr. Adatia began his career at Citigroup as an Investment Banking Analyst in the Global Communications Group and later joined the firm's Global Special Situations Group, where he focused on public market debt and equity investments.

### Item 3 - Disciplinary Information

Mr. Adatia has not been involved in any legal or disciplinary events that would be material to a client's or prospective client's evaluation of Mr. Adatia or of Westwood.

### Item 4 - Other Business Activities

Mr. Adatia is not engaged in any other investment-related business, and he does not receive compensation in connection with any business activity outside of Westwood.

### Item 5 - Additional Compensation

Mr. Adatia does not receive economic benefits from any person or entity other than Westwood in connection with the provision of investment advice to clients.

### Item 6 - Supervision

Adrian Helfert has been designated as the person responsible for supervising Mr. Adatia's activities on behalf of Westwood and responding to questions concerning Mr. Adatia's advisory activities. Mr. Helfert can be reached directly by calling the telephone number on the cover of this brochure supplement.

## **Scott Barnard**

### Item 2 – Educational Background and Business Experience

Born 1983

B.S., Finance, University of Colorado at Boulder, Boulder, CO (2006)

Mr. Scott Barnard joined Westwood in 2020 and serves as Senior Vice President, Fixed Income Portfolio Manager and Research Analyst. Prior to Westwood, Mr. Barnard was an Associate Portfolio Manager at Amundi Pioneer where he helped design, launch and manage numerous customized investment solutions for both institutional and retail clients during his time at Amundi Pioneer. During his 14-year Amundi tenure, Mr. Barnard also co-created a risk management solution that was utilized across the entire firm for all fixed income portfolios. Mr. Barnard is the CFA® charter holder.

### Item 3 - Disciplinary Information

Mr. Barnard has not been involved in any legal or disciplinary events that would be material to a client's or prospective client's evaluation of Mr. Barnard or of Westwood.

### Item 4 - Other Business Activities

Mr. Barnard is not engaged in any other investment-related business, and he does not receive compensation in connection with any business activity outside of Westwood.

### Item 5 - Additional Compensation

Mr. Barnard does not receive economic benefits from any person or entity other than Westwood in connection with the provision of investment advice to clients.

### Item 6 - Supervision

Adrian Helfert has been designated as the person responsible for supervising Mr. Barnard's activities on behalf of Westwood and responding to questions concerning Mr. Barnard's advisory activities. Mr. Helfert can be reached directly by calling the telephone number on the cover of this brochure supplement.

## **Adrian Helfert**

### Item 2 – Educational Background and Business Experience

Born 1972

B.A., Physics, University of Virginia, Charlottesville, VA (1998)

M.B.A., Finance, Duke University, Durham, NC (2004)

Mr. Helfert joined Westwood in 2019 and serves as Senior Vice President and Chief Investment Officer, Wealth, Alternative and Multi-Asset Portfolios. Prior to joining Westwood, he most recently served as Managing Director and Senior Multi-Asset Portfolio Manager at Amundi in London, where he was responsible for Global Fixed Income strategies. During Mr. Helfert's 13-year Amundi tenure, he also was an investment team leader on absolute return, unconstrained and total return portfolios. Prior to joining Amundi, Mr. Helfert worked at Royal Bank of Scotland, Fidessa and JPMorgan's Asset Management Group.

### Item 3 - Disciplinary Information

Mr. Helfert has not been involved in any legal or disciplinary events that would be material to a client's or prospective client's evaluation of Mr. Helfert or of Westwood.

### Item 4 - Other Business Activities

Mr. Helfert also serves as the Chief Investment Officer for Westwood's Wealth Management division which consists of affiliated firms Westwood Advisors, LLC and Westwood Trust. Mr. Helfert is not engaged in any other investment-related business, and he does not receive compensation in connection with any business activity outside of Westwood and its affiliates.

### Item 5 - Additional Compensation

Mr. Helfert does not receive economic benefits from any person or entity other than Westwood in connection with the provision of investment advice to clients.

### Item 6 - Supervision

Brian Casey has been designated as the person responsible for supervising Mr. Helfert's activities on behalf of Westwood and responding to questions concerning Mr. Helfert's advisory activities. Mr. Casey can be reached directly by calling the telephone number on the cover of this brochure supplement.

## **Ben Chitten**

### Item 2 – Educational Background and Business Experience

Born 1982

B.A., Mathematics, Bucknell University, PA (2004)

Mr. Chittenden joined Westwood in 2018 and serves as a Portfolio Manager. Mr. Chittenden began his career at Bear Stearns and subsequently at J.P. Morgan. Prior to Westwood, he was at Oppenheimer, where he specialized in analyzing equities across the financial sector. He is a member of the CFA® Institute and the CFA® Society of Dallas-Fort Worth.

### Item 3 - Disciplinary Information

Mr. Chittenden has not been involved in any legal or disciplinary events that would be material to a client's or prospective client's evaluation of Mr. Chittenden or of Westwood.

### Item 4 - Other Business Activities

Mr. Chittenden is not engaged in any other investment-related business, and he does not receive compensation in connection with any business activity outside of Westwood.

### Item 5 - Additional Compensation

Mr. Chittenden does not receive economic benefits from any person or entity other than Westwood in connection with the provision of investment advice to clients.

### Item 6 - Supervision

Adrian Helfert has been designated as the person responsible for supervising Mr. Chittenden's activities on behalf of Westwood and responding to questions concerning Mr. Chittenden's advisory activities. Mr. Helfert can be reached directly by calling the telephone number on the cover of this brochure supplement.