

Your Values  
Your Influence  
Your Legacy

Our **Advice.**

Foundation &  
**Philanthropic Advisory Services**



**Westwood**  
Wealth Management®

| Let's Start a Conversation.

Foundations and charitable organizations, like individuals, are unique. Each of these philanthropic entities has a different mission, vision, set of goals and priorities. At Westwood, we understand and embrace the diversity of our nation's philanthropic sector. We have designed our investment advisory and fiduciary services specifically to meet the ever-evolving needs of our foundation and nonprofit clients.

We offer a comprehensive list of services to our philanthropic clients that include the following:



## Investment Management Solutions

Work with client to determine investment goals, timeline and risk tolerance.

Develop investment policy guidelines that allow for an acceptable level of risk, protection of principal, reliable income and the potential for long-term growth.

Create a highly-customized investment solution to meet plan spending and funding needs.

Monitor and actively manage your investments.

Present economic forecasts and capital markets updates.



## Financial Services

Provide custody services.

Furnish tax and performance reporting regarding your investments.

Disburse payments and monitor cash flow.



## Advancement Services

Process donations of publicly traded securities.

Assist with the valuation and liquidation of contributed assets.

Provide counsel and support to your planned giving efforts.

Connect you with consulting services to expand and further your fund-raising capabilities.



Westwood  
Wealth Management®

[westwoodwealthmanagement.com](http://westwoodwealthmanagement.com)

Founded in 1983, Westwood has a proven track record of providing asset management and investment advisory services to philanthropic individuals, families, foundations and nonprofit organizations through our institutional and private wealth management divisions.

Let's start a conversation so we can help extend your values and influence to further your philanthropic impact and legacy.



## Governance

Educate your board and staff on important rules and regulations that affect charitable organizations.

Present sample policies that can be customized to the needs of your organization.

Impart best practices.

Assist with succession planning.



## Grantmaking

Assist with the development of funding priorities, guidelines and grant applications.

Serve as the address of record for grant inquiries and foundation correspondence.

Provide online portal to receive, review and evaluate grant applications from potential grantees, including verification of tax-exempt status and good standing.

Process and distribute grant payments to grantees.

Facilitate the receipt of post-grant reports from grantees so you can evaluate the impact of your philanthropic investments.



## Contributor Consulting and Advice

Work with the organization's qualified contributors and their tax advisors to determine the best approach for structuring and making significant gifts.

Partner with a donor's tax advisor to determine the best approach for handling a gift with respect to the donor's broader financial situation.

Involve Westwood's financial planning team to determine a suggested approach for a single gift or broader gifting strategy.

If you are interested in learning more about how Westwood can help you achieve your philanthropic goals, please contact us.

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**Westwood**  
**Wealth Management**<sup>®</sup>

**A focused investment management boutique and wealth management firm.**

Westwood Wealth Management is a division of Westwood Holdings Group that offers trust and fiduciary services through Westwood Trust, a Texas-chartered trust company, and investment advisory services through Westwood Advisors, LLC, including the WealthCoach digital advice platform.

Westwood Management Corp. was founded and registered with the SEC in April 1983. Its parent company, Westwood Holdings Group, Inc., was launched as a public company in 2002, trading on the New York Stock Exchange under the symbol WHG.

All references to the *firm* in this document describe Westwood Holdings Group, Inc. and its wholly owned subsidiaries, which include Westwood Management Corp., Westwood Trust, and Westwood Advisors, LLC. The New York Stock Exchange, Securities and Exchange Commission and Texas Department of Banking provide multiple layers of oversight.

The firm has offices in Dallas and Houston.

**Let's start a conversation.**