Transformation for Generations

Westwood Wealth Management®

Let's Start a Conversation.

Putting Clients **First**

Westwood is a focused investment management boutique and wealth management firm.

Westwood Wealth Management provides financial planning, investment solutions and fiduciary services for individual investors and families, as well as charitable organizations.

References to Westwood Wealth Management in this document may describe any combination of Westwood Holdings Group, Inc. and its wholly owned subsidiaries, which include Westwood Trust, Westwood Advisors, LLC and Westwood Management Corp.

The parent company of Westwood Trust and Westwood Advisors, LLC, Westwood Holdings Group, Inc. was launched as a public company in 2002, trading on the New York Stock Exchange under the symbol "WHG."

The New York Stock Exchange, Securities and Exchange Commission and Texas Department of Banking provide multiple layers of oversight.

The firm has two offices in Dallas and Houston.

Westwood Wealth Management and its affiliates do not provide tax, legal or accounting advice.

Core values.
Secure legacy.

At Westwood Wealth Management, we align with your values and help make your intentions a financial reality. Our advice integrates a values-based process with leading-edge investment solutions and an unmatched client experience. We are proud to have helped create lasting legacies for families and individuals, and foundations and nonprofits. We look forward to helping you.

Let's start a conversation.


YOUR VALUES
I want my
financial life
to reflect my values.

As we help clients articulate the meaning of their wealth and achieve their financial objectives, we rely on our discovery process to ensure investment decisions align with our clients' unique goals and values.

World-Class Capabilities and a Values-Based Advice Process

We follow a personalized process to understand and clarify your financial sense of purpose.

To champion your values, we oversee every aspect of your wealth management strategy.

We employ highly customized investment solutions designed to grow and protect client assets.

We provide tailored solutions through our flexible, customizable planning capabilities with personalized client service.

Our Services.

Financial Planning

We review your current estate plan and:

• Prepare a straightforward review

• Identify and help mend inadvertent gaps, working closely with family advisors

• Summarize your goals and estate planning decisions in coordination with your estate planning attorney

Investment Management and Financial Reporting

We provide you with:

• Customized portfolio construction, including asset allocation, and management based on your specific situation and goals

• A robust suite of strategic and tactical investment solutions designed to improve your outcomes while preserving capital

• Access to private investment opportunities at lower capital commitment levels than direct investment

Lifestyle Planning

We analyze your assets, income and savings to ensure you are positioned to achieve your goals and provide advice on:

• Income tax-deferral and minimization strategies

• Education funding planning

• Planning for health care and long-term care

• Optimization of savings, deferred compensation and other retirement benefit planning, including Social Security

• Special needs planning

Tax Planning

We can:

• Conduct active tax-loss harvesting and construct a tax-efficient portfolio

• Work closely with your CPA and/or estate planning attorney to tailor approaches to your unique tax situation

Trust/Estate Administration and Management

We can help use trusts to:

- Reduce estate tax liability
- Function as a vehicle for asset distribution to beneficiaries
- Assist in managing financial affairs (family governance) to ensure your legacy is aligned with your values
- Carry out wishes expressed in a will in a timely, efficient manner, protect and distribute assets, and manage taxes
- Provide trust administration and fiduciary services

Risk Management

We will review your holdings, current risk profile and closely held or concentrated holdings to:

- Ensure your current insurance provides adequate coverage and competitive premiums. We coordinate with your broker to fill holes or reduce coverage as needed
- Discuss potential additional asset protection strategies and assist with implementation
- Plan around concentrated stock positions or closely held holdings

Charitable Planning and Philanthropy

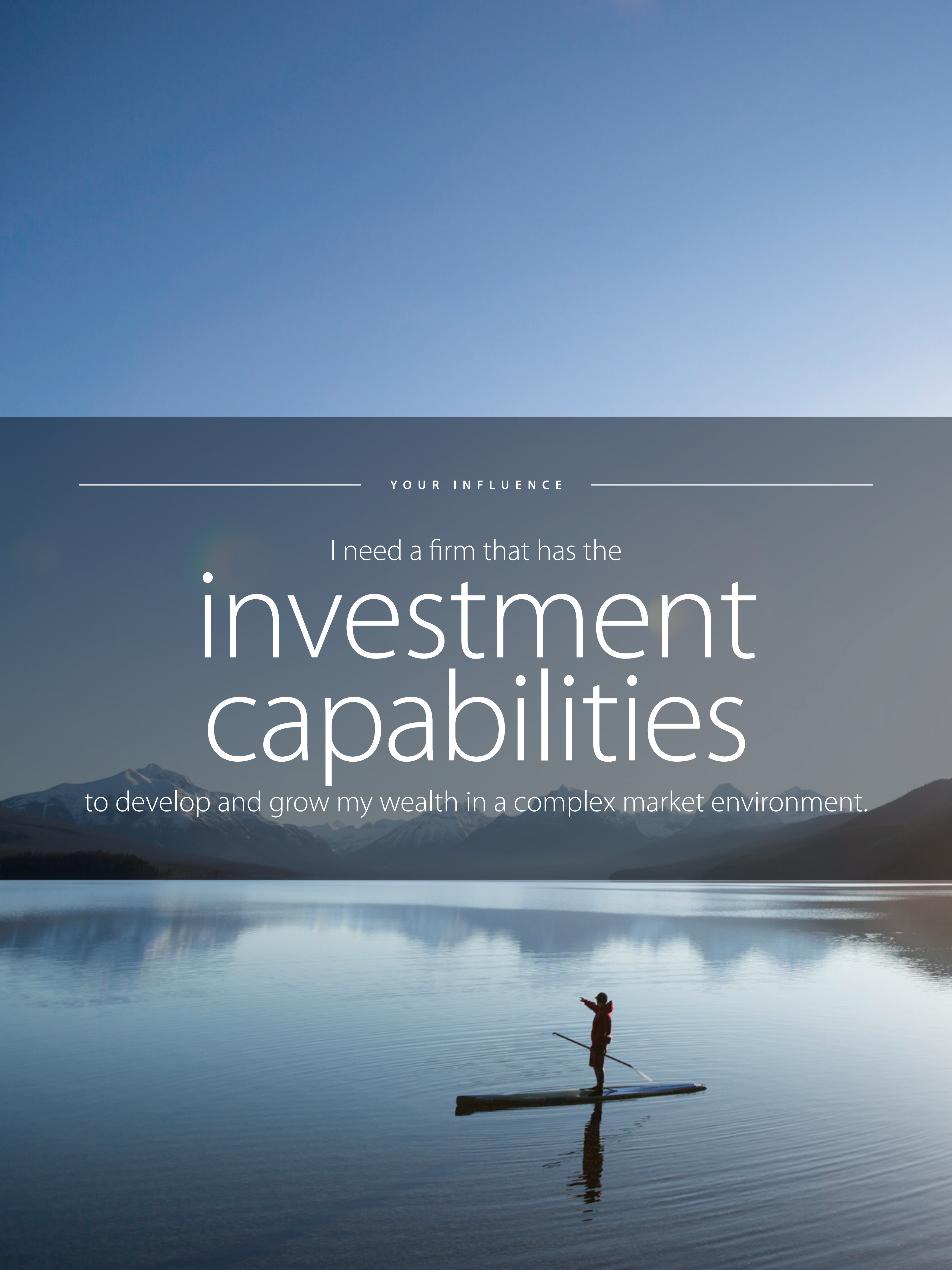
We can implement and help educate you on charitable giving vehicles and techniques such as:

- Private foundations, donor advised funds and charitable trusts
- Philanthropic services, including foundation management, governance and grantmaking assistance
- Gifting of appreciated stock when appropriate

Other Services

These include:

- Administration and governance of family entities, such as family limited partnerships
- Serve as agent or custodian and manage selected assets
- Assist in establishing and managing an IRA



YOUR INFLUENCE

I need a firm that has the

investment capabilities

to develop and grow my wealth in a complex market environment.

Accumulated wealth often comes with many financial complexities. Westwood Wealth Management can help you navigate through those complexities with diversified strategies and customized investment solutions. Together, we can focus your investments on strategies that will help you fulfill your financial sense of purpose and have a positive influence on the people or causes that you care about most. At Westwood Wealth Management, we are able to provide clients with a wide range of investment expertise given the ability to leverage the broad capabilities of the entire firm.

Institutional Investment Expertise and Customized Solutions

Our values are important in the way we approach investing client assets. We believe we can improve client outcomes with our strategic and tactical allocation with an emphasis on preserving clients' capital.

With our firm's proprietary research, we independently assess securities and compare our findings to external research before making investment decisions.

It is part of our firm's operating philosophy to embrace environmental, social and governance criteria.

YOUR LEGACY

The cornerstone of my legacy is

safeguarding

my family's future and transferring my values to the next generation.

Working through the intricacies of estate planning can be a daunting endeavor. At Westwood Wealth Management, we've helped clients design legacies that will serve their families and communities for years to come.

Estate Planning Capabilities

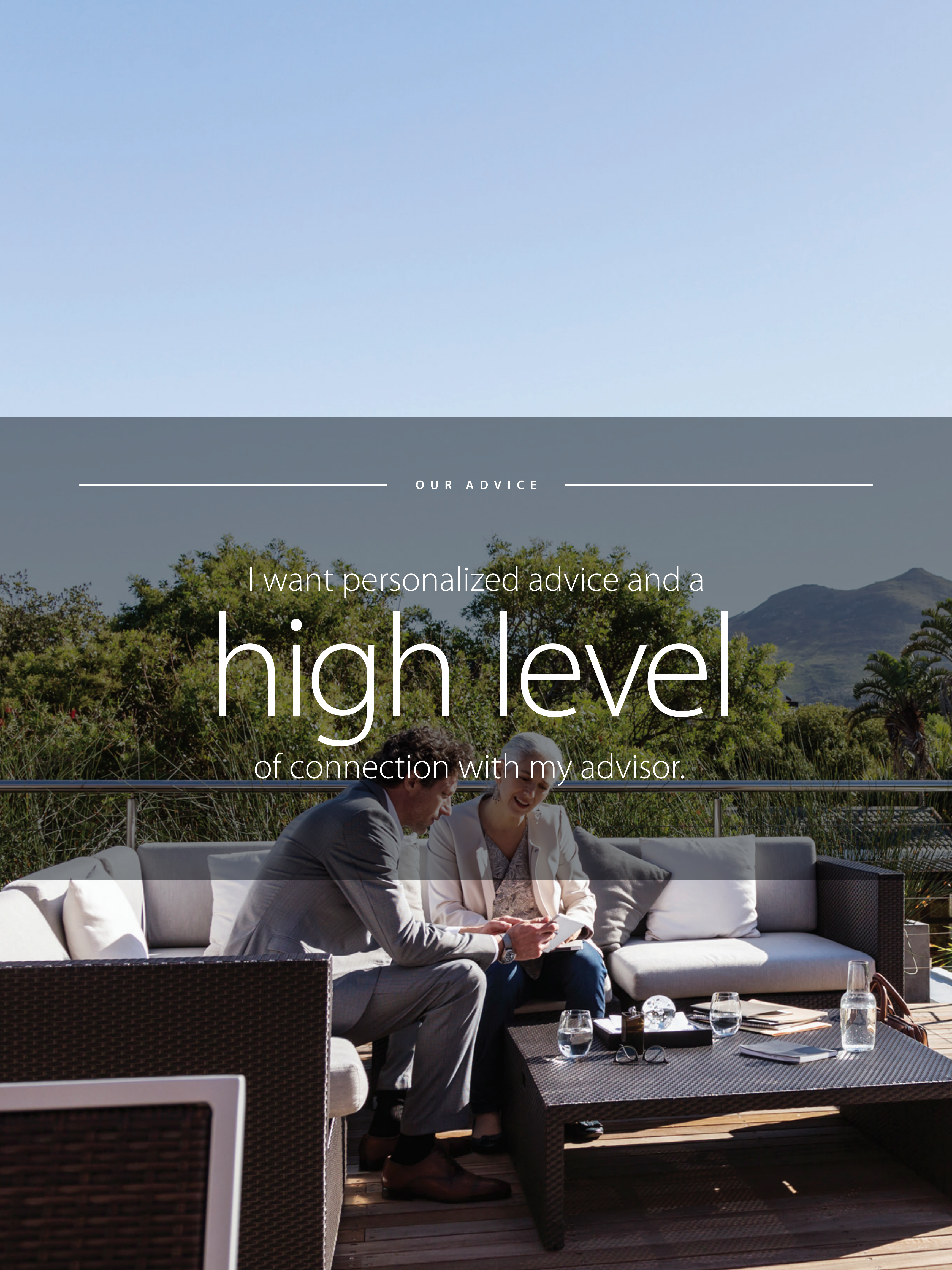
Through our trust company, we have a fiduciary obligation to act in the best interests of our clients.

We have estate planning professionals on staff who can help you navigate trust and estate administration.

We are able to serve as executor and trustee to carry out your wishes as outlined in your estate planning documents.

We can help you express your charitable giving priorities and make decisions on wealth transfer by collaborating with your attorney to document your wishes.

We help families enjoy their wealth today while building their legacy for the future.



OUR ADVICE

I want personalized advice and a

high level

of connection with my advisor.

We put our clients first. This is more than just words; it is embedded in our culture at Westwood Wealth Management.

Unmatched Client Experience

We put our clients first. This is more than just words; it is embedded in our culture at Westwood Wealth Management.

The employee-ownership structure of our firm aligns our employees' interests with those of our clients.

Our focus on serving clients, coupled with a disciplined investment approach, has helped Westwood Wealth Management to grow, largely through referrals from current clients.

Putting Clients First.

Our advice.

Our advice integrates a values-based process with leading-edge investment solutions and unmatched service. We will use our discovery process to make sure we understand your values, discuss the ways your investments can reflect those distinct values and help influence the people and causes that are most important to you, so you can leave a lasting legacy.

Westwood
Wealth Management®

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