Your Values
Your Influence
Your Legacy

Our **Advice.**

Investment Solutions:
Enhanced Balanced®

Westwood Wealth Management®

Let's Start a Conversation.

We aim to improve your investment outcomes and protect your capital in challenging markets through diversified, customized investment solutions. Working together with you, we can develop investment strategies that benefit you and those you care about the most.

Enhanced Balanced® | Multi-Asset Solutions Focused on Improving Client Outcomes

Discovery Process

We will work with you to determine your investment goals, timeline and risk tolerance.

Our goal is to create a highly customized investment solution, following strict investment policy guidelines, to align with your goals and values.

Outcome Oriented

Our approach to asset allocation provides participation in up markets, while minimizing risk helps inform buy and sell decisions in the portfolio.

We strive to enable clients to grow wealth in up markets and protect assets in down markets.

Risk Focused

We seek to grow and protect capital while minimizing risk.

We monitor and actively manage your investments.

Our allocations are subject to several layers of oversight, including the Westwood Wealth Management Team, Westwood Wealth Management Strategic Allocation Committee, Westwood Wealth Management Investment Fund Selection Committee and NEPC.

Founded in 1983, Westwood has a proven track record of providing asset management and investment advisory services to 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 impact and legacy.

Attractive Diversification

We have the ability to invest across asset classes both in the U.S. and globally.

Our asset allocation insights and research offer a multi-asset solution that helps grow and protect client capital over the long term.

Our model invests in various asset classes, including equities, fixed income and multi-asset.

Long-Term Track Record

Westwood Wealth Management has managed Enhanced Balanced to provide equity-like returns with less risk for over 25 years.

We are focused on providing attentive service and an unmatched client experience to address your unique, and often complex, financial needs.

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

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Westwood is an investment 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 in April 1983. Its parent company, Westwood Holdings Group, Inc., was launched as a public company in 2002.

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 firm has offices in Dallas and Houston.

Let's start a conversation.