



Westwood Wealth Management®

IMPORTANT TAX NOTICE

Form 1099-R

Form 1099-R will be mailed by January 31, 2024 to recipients who received distributions from a qualified retirement account. Forms will be sent by third-party vendor, FIS, on behalf of Westwood Wealth Management. If your form does not arrive by mid-February, please contact your account advisor.

Thank you for your continued business, and we look forward to assisting you this tax season.

Your Wealth Management Team

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