

Managed Investment Solutions

Investment Philosophy

We believe that creating customized investment portfolios for clients, using a consultative approach to identify their unique needs, goals and investment objectives, can potentially lead to better outcomes over the long term.

Why Choose Managed Investment Solutions?

Building and maintaining a customized portfolio requires expertise in design methodology, construction and implementation. With more than 20 years of experience, we've created hundreds of customized investment strategies for institutional investors as well as intermediary platforms and clients.

We work directly with clients on a consultative basis to understand their unique goals, beliefs and investment objectives. We can offer direction and insight to help inspire your creativity and customize your portfolio, building rules that define investment decisions, desired outcomes and potential changes.

Active Design

Leverage expertise in designing, constructing and implementing index methodologies to seek better investment outcomes

Outcome Oriented

Analyze current portfolios relative to desired outcomes

Rules-Based Construction

A systematic approach to achieving client objectives, targeting adequate and intended exposure, based on client direction

Transparent Implementation

End-to-end transparency across methodology, portfolio construction, implementation, execution and cost

Independent



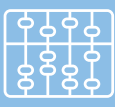



Freedom to identify and use data and investment tools that are best placed to help clients target and achieve outcomes

Adaptive

Construction and implementation that can evolve with changing client beliefs, goals and objectives

Consultative and Customized Investment Solutions

We develop investment strategies designed for a diverse array of institutional, intermediary or wealth clients. Potential investment solutions may include these factors, among others.

 <p>Direct Indexing</p>	<p>Custom index solutions that target specific goals or outcomes</p>	 <p>ESG Tilts</p>	<p>Methodologies designed to identify and improve ESG characteristics to meet client beliefs and goals</p>
 <p>Tax Managed</p>	<p>Solutions for clients with specific tax needs or loss-harvesting goals</p>	 <p>Factor Tilts</p>	<p>Tilt toward compensated risk factors while controlling other uncompensated risks</p>
 <p>Thematic</p>	<p>Methodologies that target specific macro-, micro- or outcome-oriented themes</p>	 <p>Index Plus</p>	<p>Create value from index inefficiencies utilizing a limited-risk budget</p>

Contact Us for More Information

westwoodgroup.com/managed-investment-solutions

Disclosure

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Indexes are unmanaged, do not incur management fees, costs and expenses, and cannot be invested in directly. The index is unmanaged and is not available for direct investment

Westwood believes Environmental, Social and Governance (ESG) or values-based considerations are important factors in evaluating potential investments. Investments that align with the investor's values allows an incorporation of values-based investing. Portfolios using ESG tilts can be created through inclusionary and exclusionary investment practices to achieve the client's investment object. The ESG tilts are implemented using relevant screens from a third-party vendor. Westwood does not generally verify or override the ESG screens and related data from its third-party vendors. When clients have selected an ESG tilt to screen, Westwood does not assess securities other than those identified by the third-party vendor. When implementing ESG tilts or screens, Westwood seeks to track the risk and return characteristics of the underlying index. The investment return and or risk may vary from the underlying index. Westwood does not generally implement ESG proxy voting.

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