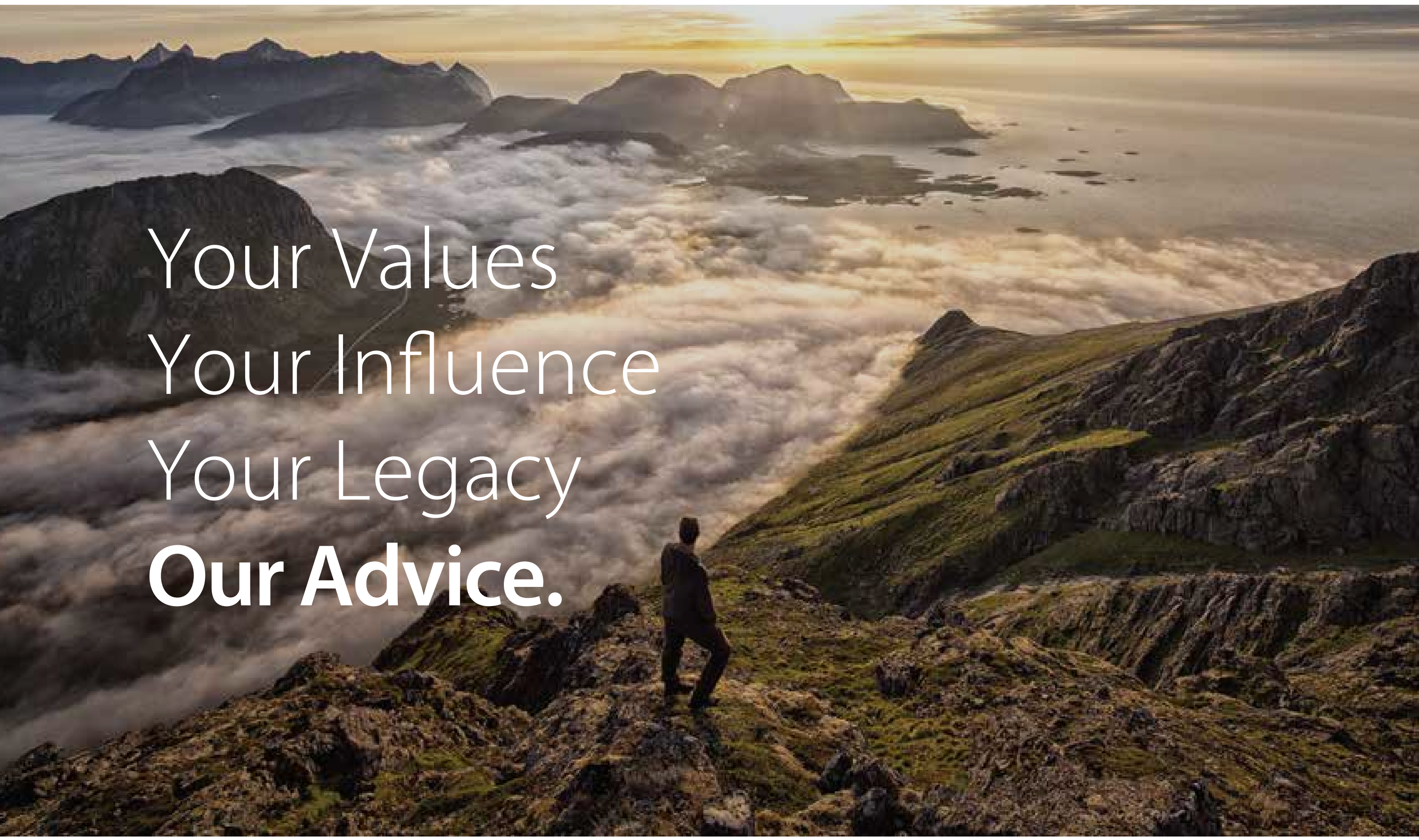
Westwood Wealth Management®



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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.

Putting Clients **First**

Westwood is a global investment and wealth management firm.

Westwood Wealth Management provides financial planning, investment solutions and fiduciary services for high net worth individuals and families, as well as charitable organizations.

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 brochure describe Westwood Holdings Group, Inc. and its wholly owned subsidiaries, which include Westwood Management Corp., Westwood Trust, Westwood Advisors, LLC, and Westwood International Advisors Inc.

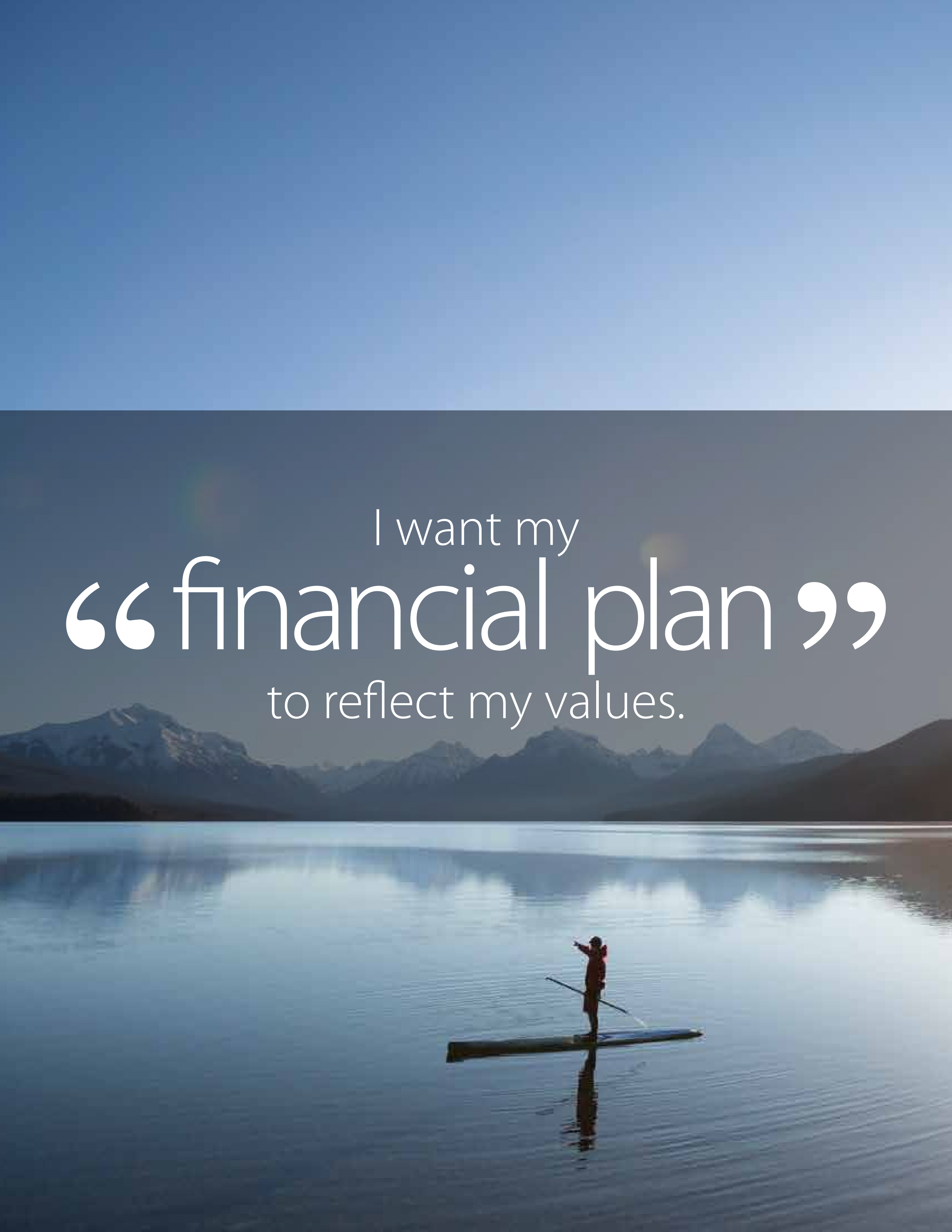
The New York Stock Exchange, Securities and Exchange Commission and Texas Department of Banking provide multiple layers of oversight.

The firm has offices in Dallas, Houston, Toronto and Boston.

Our **Approach**

Your core values drive your sense of purpose and become the starting point for personal and financial discovery. They are the basis for defining your financial philosophy, determining what's most important and why it matters to you. These core values serve as a guide to shape your financial independence, enabling you to have a positive influence on the people or causes that you care about most. Creating your legacy will transcend the value of your wealth, safeguarding your family's security and social impact in the future.

At Westwood Wealth Management, we will champion 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, endowments, foundations and nonprofits, and corporate and public retirement plans for more than 30 years. We look forward to helping you.
Let's start a conversation.


I want my
"financial plan"
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.

Our fiduciary and investment services include comprehensive wealth planning and management, trust and estate administration and management, agent and custody services, IRA administration, charitable planning, as well as specialized fiduciary services for charitable organizations.

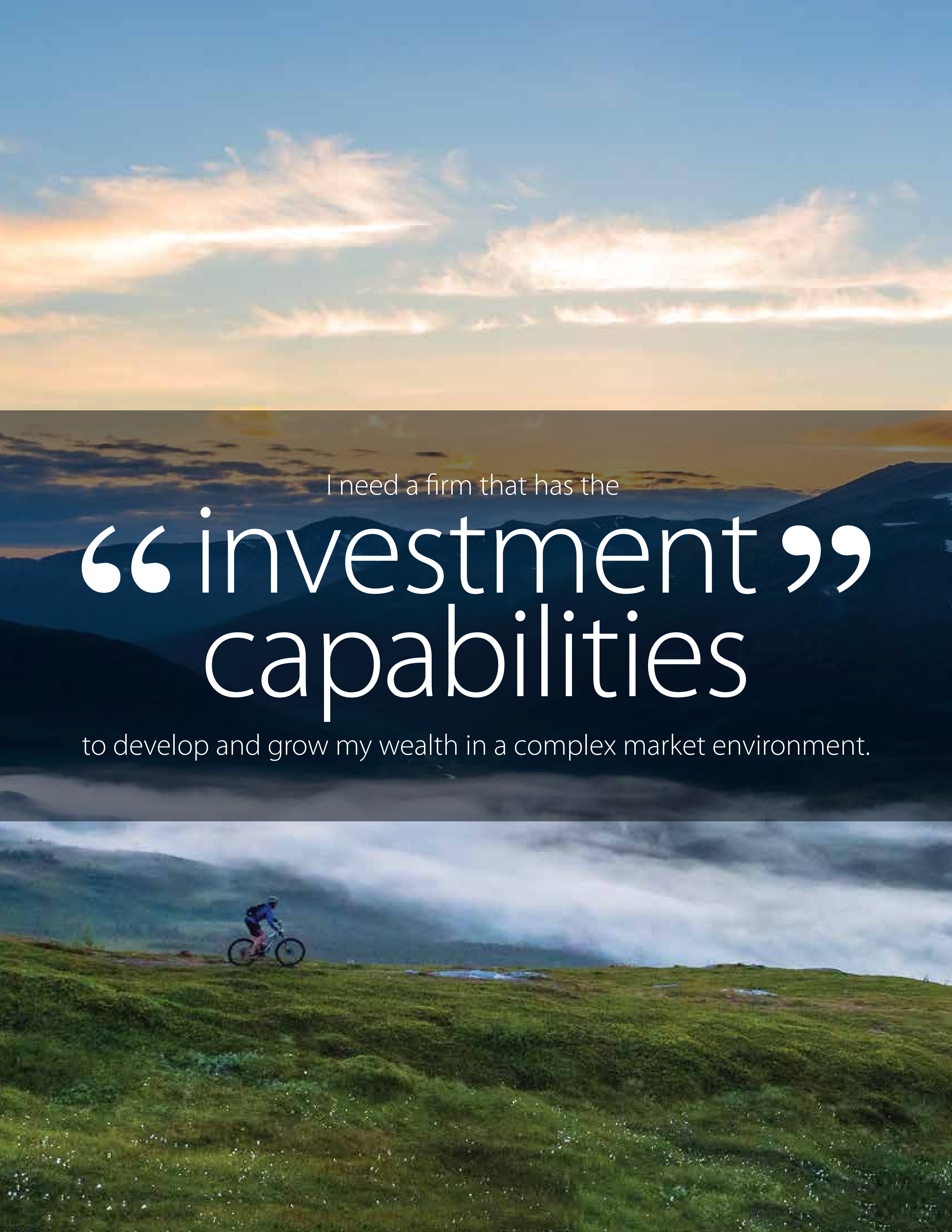
We employ highly customized investment solutions designed to grow and protect client assets.

$24B+
Firm AUM*

More than
34
years of investment experience

Over
50
investment professionals firmwide

*As of December 31, 2017



I need a firm that has the

“investment capabilities”

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

High Conviction and Outcome-Oriented Investment Strategies

- AllCap Value
- LargeCap Value
- LargeCap Concentrated
- Equity Select — Tax Managed
- REITs
- Fixed Income
- Mutual Funds and ETFs as Needed

Let's start a **conversation.**

Pricing

$500,000-$2,000,000 accounts: .95%

$2,000,000+ accounts: .85%

Westwood
Wealth Management®