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## Focused on You.

### Welcome to Westover Capital

**Westover Capital Advisors** (Westover) is an independent, privately-owned investment and wealth management firm founded in 1999. We have a fiduciary relationship with all of our clients. This means we have a fundamental obligation to act in the best interests of our clients, and to provide advice which we believe is always in their best interests. In addition to our advice, we offer our clients a duty of undivided loyalty and utmost good faith.

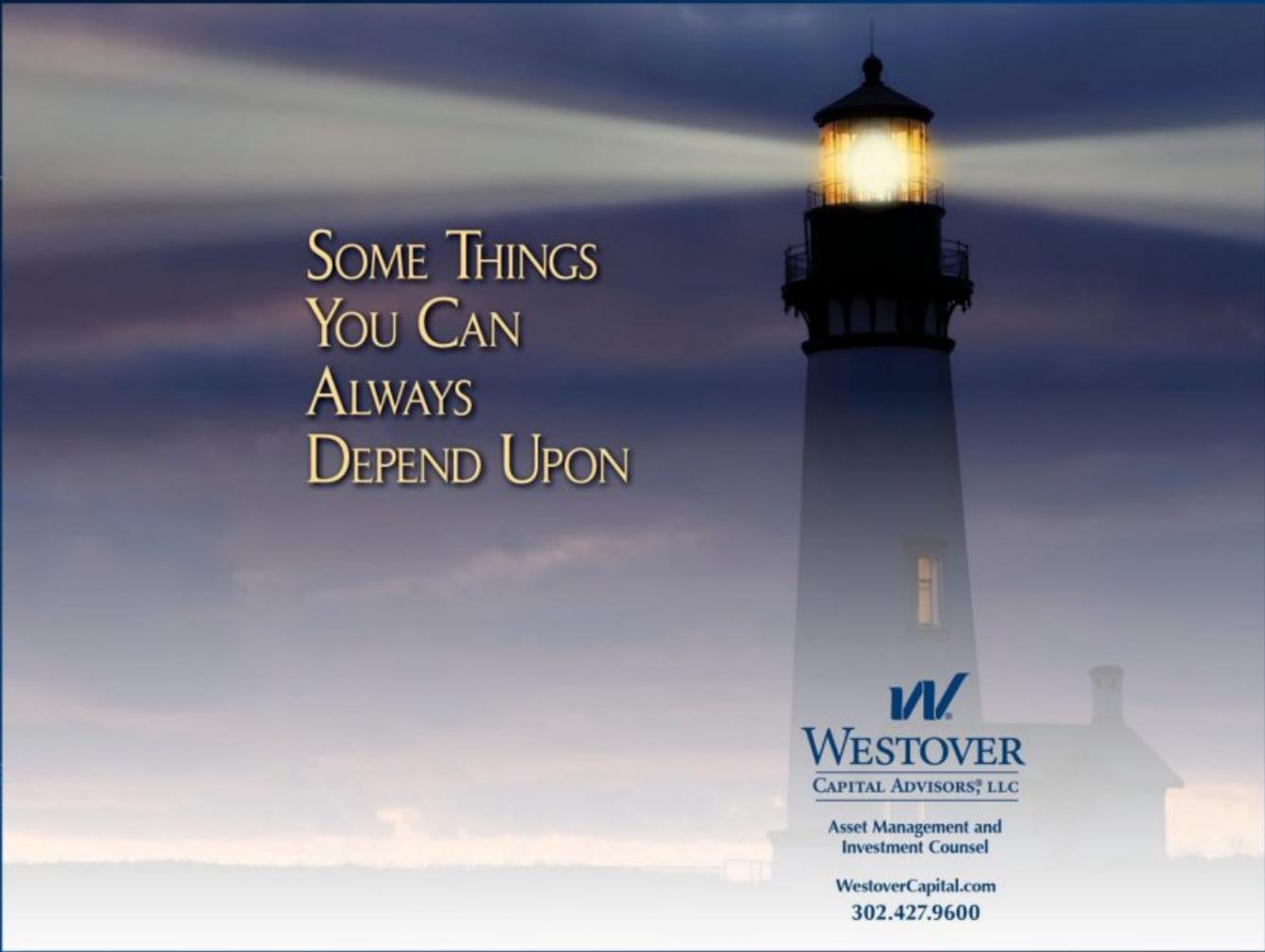
Westover is a fee-based advisor providing our services primarily to high net-worth individuals, their families, family offices and foundations. We tailor our strategies toward their needs. We do this by providing our clients sophisticated, thoughtful and goal-oriented financial advice. Our dedicated advisors personally get to know our clients in order to design customized strategies that integrate the pieces of their financial life holistically in order to help them grow, preserve, transfer and structure their wealth in accordance with their particularized goals.

At Westover, our team of financial experts work to seek solutions for challenges created by the scale of our client's wealth. We work to address the myriad wealth management and investment challenges that arise from our client's personal, legacy and business needs.

As our client, we believe our advice should reflect not only where you are today, but also should provide alternative scenarios for where you want to go tomorrow. We are aware of the unique circumstances that apply to each of our clients, and are both mindful of and humbled by our role as your trusted advisor. Westover's advisors rely on their experience, training and judgment to create customized portfolios, client-specific plans and recommendations. Our advisors hold advanced degrees and certifications in the investment field (CFA<sup>®</sup>), financial planning arena (CFP<sup>®</sup>), business administration (MBA) and in law (JD).

If this philosophy resonates with you, we invite you to have a confidential conversation with us.

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[Download Our Brochure](#)



## Westover Luncheon Series: Erin Arvedlund

Enjoy the replay of our June 2019 Westover Luncheon Series featuring Erin Arvedlund, the former Barron's reporter who broke the story of Bernie Madoff nearly seven years before the scandal rocked the financial world.



## New Retirement Act Passes House; Gives Rise to Important Planning Opportunity

Who says cats and mice can't play nicely together? On May 23rd, the House of Representatives passed a significant retirement bill by a vote of 417 to 3. The SECURE Act is a Big Deal and augurs the biggest changes to retirement plans in a decade.



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### mit Speaker Paul Begala

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"Begala's humorous assessment of the national political landscape was shared with an audience at Wilmington Country Club at the invitation of Westover Capital Advisors."

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