



Investing Where It Counts

Investment Management

Westwood offers investment capabilities across high-conviction equity and outcome-oriented solutions for institutional investors, intermediaries and financial advisors.

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Wealth Management

Westwood offers expert advice to oversee every aspect of a client's wealth strategy including financial planning, trust and estate services, customized investment solutions and financial services for charitable organizations.

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Corporate Overview

Westwood is a publicly traded company that communicates with investors, financial analysts and the public, and is committed to best-in-class disclosure, transparency and public relations practices.

Westwood is a global investment and wealth management firm with \$16.8B in assets under management, including \$2.7B in values-based and socially responsible investment mandates as of March 31, 2019.

Our active, fundamental bottom-up approach in the pursuit of alpha is combined with a strong emphasis on managing downside risk. For over 35 years, our foundational focus has been to protect client capital and to help clients weather some of the most challenging markets in history. Being active describes more than our approach to investing. It's also how we run our business as a publicly traded company. We are focused on transparency, ethical conduct, giving back to the communities in which we operate and creating an environment where our employees can flourish as they serve our clients. We are active in providing high-value investment strategies, values-based advice, exceptional client service and always putting our clients' interests first.

High Conviction: Anticipate the Alpha Opportunity

Institutional investors may need to reconsider current equity valuations and the potential for lower returns over the next 10 years vs....

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Emerging Markets: Glass Half Full

Emerging Markets (EM) is now 60 percent of the world's GDP and more than...

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Anticipate the Alpha Opportunity in Small Cap: Tighter Credit Con...

The debt load continues to remain elevated with over \$1 trillion in loans outstanding, negatively...

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Understanding Social Security Retirement Benefits Factors

Social Security retirement benefits are an important income stream for many Americans. However, several...

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