

Investing for All

At Westwood WealthCoach, our mission is to level the playing field for all investors.



Real-Life Investment Solutions

Smart financial planning and the right mix of investments can help you achieve your life



Experience Advice

We've been there. At Westwood WealthCoach, we have investment professionals and experienced WealthCoach



Low Cost

To help level the playing field, we offer a flat, low fee that includes when-you-need-it digital advice at no additional cost.



Concierge Service

A WealthCoach advisor will answer your financial questions and help you get started with a free

Retire Healthy



Low Fees

Westwood WealthCoach fees are low and, unlike some competitors, include advice at no additional cost.

Plan to keep more of your hard-earned money working for you.

\$500,000

\$5,000



Your
Investment

\$2,000,000

Annual fees with a traditional advisor are typically 1.00%*

Annual fees with your personal WealthCoach are 0.35%

our Annual Savings

\$123

Transparent Fees

No additional trading or custody fees.**

INVEST NOW

*Source: Bloomberg Inside Information Planning Profession Fee Survey, 2017

**0.35% fee includes trading and custody expenses. Please see the WealthCoach brochure for detailed fee information.



Hi, I am and I have a

question about

ASKWEALTHCOACH

The AskWealthCoach feature enables existing clients and other users to submit questions to the Westwood WealthCoach team. Existing clients may submit questions through AskWealthCoach for no additional fee. Other users may also submit questions for no fee. However, submitting questions or participating in a free session does not establish an investment advisory agreement or other relationship with Westwood Advisors, LLC.

