

Item 1 – Cover Page



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This Brochure provides information about the qualifications and business practices of WestEnd Advisors, LLC (“WestEnd” or the “Firm”). If you have any questions about the contents of this Brochure, please contact us at 888-500-9025 or at info@westendadvisors.com. The information in this Brochure has not been approved or verified by the United States Securities and Exchange Commission (“SEC”) or by any state securities authority.

WestEnd is registered with the SEC as an Investment Adviser under the Investment Advisers Act of 1940. Registration as an Investment Adviser does not imply any level of skill or training.

Additional information about WestEnd also is available on the SEC’s website at www.adviserinfo.sec.gov.

Item 2 - Material Changes

In accordance with SEC Rule 204-3 under the Investment Advisers Act of 1940 (the “Brochure Rule”), WestEnd is required to prepare a disclosure document (“Brochure”) that describes the firm and its business practices. Pursuant to SEC rules, we are required to update our Brochure at least annually and provide you with a summary of any material changes since the previous annual amendment.

Material changes since the last amendment of this Brochure on March 31, 2023, include the addition of Mr. Graham K. Hunt and Mr. Jason M. Leibowitz to Managing Members of the firm and the removal of Mr. Michael W. Goldman as a Managing Member. Mr. Goldman still maintains an active role with the firm advising management on business and sales strategy. This Brochure also includes various updates to clarify and enhance certain of WestEnd’s existing disclosures. We recommend that you read this Brochure in its entirety.

With this summary, we hereby offer to deliver a complete copy of our Brochure upon your request at any time during the year. You may request our Brochure at any time by contacting us at 888-500-9025 or info@westendadvisors.com.

Additional information about WestEnd is also available via the SEC’s website www.adviserinfo.sec.gov. The SEC’s website also provides information about any persons affiliated with WestEnd who are registered as investment adviser representatives of the Firm.