



Investment Adviser Brochure

Westwood Management Corp.

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This brochure provides information about the qualifications and business practices of Westwood Management Corp. If you have any questions about the contents of this brochure, please contact us at (214) 756-6900 or complianceapproval@westwoodgroup.com. The information in this brochure has not been approved or verified by the United States Securities and Exchange Commission or by any state securities authority.

Additional information about Westwood Management Corp. also is available on the SEC's website at www.adviserinfo.sec.gov.

Westwood Management Corp. is an SEC registered investment adviser. Registration does not imply a certain level of skill or training.

Item 2 – Material Changes

The following reflect the changes made since the annual update on March 31, 2024:

Item 4: Advisory Business

- Added description to reference Westwood ETFs
- Updated list of available investment strategies to remove references to the MidCap Value, Total Return SMA, Global Real Estate and to reflect the renaming of the High Income Strategies to Multi-Asset Income Strategies and of the Select Income Strategy to Real Estate Income
- Updated trade rotation disclosure to describe trading process for the Tactical Growth strategy
- Removed disclosures and descriptions of the “Sensible Fees” branding of performance-based fee arrangements which are no longer promoted
- Updated description of Tactical Growth and Tactical Plus Strategies

Item 10: Other Financial Industry Activities and Affiliations

- Updated the description of Westwood’s affiliates and their business
- Removed reference to Westwood employees registered with Foreside Fund Services
- Updated disclosure of Energy Team revenue sharing to include a disclosure of carried interest

Changes made since the last annual updated on March 31, 2025:

- Item 4: Updated dual contract SMA minimum account size