

Form ADV Part 3 – Client Relationship Summary

Date: 03/29/2024

Item 1: Introduction

WESTWOOD WEALTH MANAGEMENT is an investment adviser offering advisory accounts and services. This document gives you a summary of the types of services and fees we offer. Please visit www.investor.gov/CRS for free, simple tools to research firms and financial professionals, as well as educational materials about broker-dealers, investment advisers, and investing.

Item 2: Relationships and Services

***Questions to ask us:** Given my financial situation, should I choose an investment advisory service? Why or why not? How will you choose investments to recommend to me? What is your relevant experience, including your licenses, education and other qualifications? What do these qualifications mean?*

What investment services and advice can you provide me? Our firm primarily offers the following investment advisory services to retail clients: portfolio management (we review your portfolio, investment strategy, and investments). As part of our standard services, we typically monitor client accounts on a daily basis. Our firm has discretionary management without any material limitations. We limit the types of investments that are recommended but do not limit these investments to proprietary products. Our firm does *not* have a minimum account size. Please also see our Form ADV Part 2A ("[Brochure](#)"), specifically Items 4 & 7.

Item 3: Fees, Costs, Conflicts, and Standard of Conduct

***Questions to ask us:** Help me understand how these fees and costs might affect my investments. If I give you \$10,000 to invest, how much will go to fees and costs, and how much will be invested for me? How might your conflicts of interest affect me, and how will you address them?*

What fees will I pay? Depending on the services you receive, fees may vary. Westwood Wealth Management is a fee-based money manager, so the amount of assets in your account affects our advisory fee; the more assets you have in your advisory account, the more you will pay us and thus we have an incentive to increase those assets in order to increase our fee. Please also see Item 10 of our [Brochure](#) for additional details. Portfolio management fees are charged on a quarterly basis from a percentage of Assets Under Management. Please also see Items 4, 5, 6, 7 & 8 of our [Brochure](#).

Some investments (e.g., hedge funds) impose additional fees (e.g., transactional fees) that reduce the value of your investment over time. The same goes for any additional fees you may pay to a custodian. Additionally, you will pay transaction fees, if applicable, when we buy or sell an investment for your account. **You will pay fees and costs whether you make or lose money on your investments. Fees and costs will reduce any amount of money you make on your investments over time. Please make sure you understand what fees and costs you are paying.** Please also see our [Brochure](#) for additional details.

What are your legal obligations to me when acting as my investment adviser? How else does your firm make money and what conflicts of interest do you have? As your investment adviser, we always act with your best interest in mind. When we act as your investment adviser, we have to act in your best interest and not put our interest ahead of yours. At the same time, the way we make money creates some conflicts with your interests. You should understand and ask us about these conflicts because they can affect the investment advice we provide you. Here are some examples to help you

understand what this means (see heading immediately below).

Form ADV Part 3 – Client Relationship Summary

Date: 03/29/2024

How do your financial professionals make money? Primarily, we and our financial professionals receive cash compensation from the advisory services we provide to you because of the advisory fees we receive from you. This compensation may vary based on different factors, such as those listed above in this Item. Please also see Item 10 of our [Brochure](#) for additional details.

Item 4: Disciplinary History

Westwood Wealth Management does not have any legal and disciplinary events. Visit <https://www.investor.gov/> for a free, simple search tool to research us and our financial professionals.

Item 5: Additional Information

If you have any questions, need additional information, or want another copy of this Client Relationship Summary, then please contact us at (424) 255-3120.

Form ADV Part 3 – Client Relationship Summary

Date: 03/29/2024

Exhibit A – Material Changes to Client Relationship Summary

WWM has made the following changes to their Form ADV Part 3 last updated in May of 2021:

1. Added questions to ask throughout the document
2. Updated to include conflicts of interest that may affect client fees
3. Updated to reflect additional fees that may be charged to clients invested in the hedge fund

Please call us at (424) 255-3120 for up-to-date information about our services or to request a copy of our Form ADV Part 2A or visit <https://adviserinfo.sec.gov/firm/summary/290658>