



## Adrian Helfert Joins Westwood Holdings Group

January 28, 2019

DALLAS, Jan. 28, 2019 (GLOBE NEWSWIRE) -- Westwood Holdings Group, Inc. is pleased to announce that Adrian Helfert has joined as Senior Vice President and Director of Multi-Asset Portfolios where he will lead Westwood's multi-asset strategies group, which includes Westwood's Income Opportunity and Flexible Income strategies, as well as Westwood's Global Convertibles and Fixed Income strategies.

Westwood is taking Multi-Asset to the next level to enable delivery of desired outcomes and to build on its history as a pioneer in the space:

- Started offering balanced portfolios in the 1980s;
- Developed a proprietary Enhanced Balanced<sup>®</sup> model in the 1990s;
- Launched and built a successful Income Opportunity franchise — now a mature, flagship product; and
- Introduced Westwood's newest strategy, Flexible Income, to provide clients with diversified income.

Mr. Helfert is ideally suited for this Multi-Asset leadership role, with a strong track record compiled while working on collaborative, global teams. His experience in defining strategic investment directions and developing and launching new products, all while establishing a great industry reputation, makes him a great fit for Westwood.

Most recently, Mr. Helfert served as Managing Director and Senior Multi-Asset Portfolio Manager at Amundi in London, where he was responsible for Global Fixed Income strategies. During his 13-year Amundi tenure, he also worked on absolute return, unconstrained and total return portfolios. As a member of Amundi's Architect Committee — seven key individuals from around the world — he helped define the strategic direction of Global Fixed Income Investments. Previously, Mr. Helfert worked at Royal Bank of Scotland and JPMorgan's Asset Management Group.

Mr. Helfert earned a Master of Business Administration from Duke University's Fuqua School of Business and a bachelor's degree in physics from the University of Virginia, where he was awarded a fellowship for his work in Solid State Physics. He also served in the U.S. Navy / Marine Corps as a Combat Medic.

*Westwood Holdings Group, Inc. provides investment management services to institutional investors, private wealth clients and financial intermediaries. The firm has \$20.8 billion in assets under management, of which \$3.5 billion are in values-based and socially responsible investment mandates as of Sept. 30, 2018. Westwood offers a range of investment strategies including U.S. equities, Multi-Asset, Global and Emerging Markets equities, Global Convertible securities and Master Limited Partnerships (MLPs) portfolios. Access to these strategies is available through separate accounts, the Westwood Funds<sup>®</sup> family of mutual funds, UCITS funds and other pooled vehicles. Westwood benefits from significant, broad-based employee ownership and trades on the New York Stock Exchange under the symbol "WHG." Based in Dallas, Westwood also maintains offices in Toronto, Boston and Houston.*

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