Westwood Fortifies Multi-Asset Franchise and Eyes Broader Expansion

March 20, 2019

DALLAS, March 20, 2019 (GLOBE NEWSWIRE) -- Westwood Holdings Group, Inc. is pleased to announce that Adrian Helfert, Senior Vice President and Director of Multi-Asset Portfolios, who joined Westwood in January to replace Mark Freeman, has been added to the Income Opportunity portfolio team. Westwood is committed to continuing to manage the portfolio consistent with its long-held strategy objective: combining deep, bottom-up fundamental insights and equity-like returns while limiting downside volatility.

As the head of our Multi-Asset and Income Portfolios team, Mr. Helfert will lead Westwood's efforts to expand our Multi-Asset franchise across the continuum of absolute return, outcome-oriented and global total return. "Adrian, with his strong track record and sterling industry reputation developed while working on collaborative, global teams, is ideally suited to lead our growth objectives," said Brian Casey, President and Chief Executive Officer.

- During his 13-year tenure at Amundi, Mr. Helfert's team managed approximately $10 billion in global outcome-oriented solutions as Managing Director and Senior Multi-Asset Portfolio Manager at Amundi in London.
- As a member of Amundi's Architect Committee — seven key individuals from around the world managing $30+ billion in assets — he led a team defining the strategic direction of Global Fixed Income Investments.

Another member of Westwood's expanded multi-asset franchise, David Clott, CFA, Senior Vice President and Senior Portfolio Manager, has also joined Westwood's Income Opportunity portfolio team.

- Mr. Clott, who has been with the firm since 2014 and manages over $1.5B, will bring portfolio management experience in asymmetric risk management, strategic convertibles and absolute return.

Todd Williams, CFA, will continue to support Income Opportunity and all of Westwood's U.S. Value Equity strategies, in his role as Senior Vice President and Director of Equity Research. Dan Barnes, CFA, will no longer be supporting the Income Opportunity team. Mr. Helfert will replace Dan Barnes on our Low Volatility Equity team, joining David Clott, Matt Lockridge, Senior Vice-President and Co-Director of Equity Portfolios, and Shawn Mato, CFA, Senior Vice President and Senior Portfolio Manager.

Westwood Holdings Group, Inc. provides investment management services to institutional investors, private wealth clients and financial intermediaries. The firm has $16.6 billion in assets under management, of which $3.0 billion are in values-based and socially responsible investment mandates as of Dec. 31, 2018. Westwood offers a range of investment strategies including U.S. equities, Multi-Asset, Emerging Markets equities, Global Convertible securities and Master Limited Partnerships (MLPs) portfolios. Access to these strategies is available through separate accounts, the Westwood Funds® 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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Source: Westwood Holdings Group Inc