



WESTWOOD  
HOLDINGS GROUP, INC.\*

September 17, 2015

## Westwood Funds Hires Jonathan Dale as National Accounts Director

DALLAS--(BUSINESS WIRE)-- [Westwood Holdings Group](#), Inc. (NYSE:WHG) today announced that the firm has hired Jonathan S. Dale as National Accounts Director, Financial Institutions.

In the newly created position, Mr. Dale is responsible for financial intermediary firm relationships for [Westwood Mutual Funds](#) and Managed Accounts. He serves a key role in expanding Westwood's institutional investment brand and promoting its array of strategies with wealth management broker-dealers, RIA platforms, turnkey asset management providers, retirement plan service providers and consultants.

"Jonathan is an excellent addition to our team," said Mark Dunbar, senior vice president. "Westwood has a strong brand and a strong suite of strategies, and we believe Jonathan will help us leverage these strengths as we continue to broaden our reach in the financial advisor and intermediary space."

Westwood has three distinct investment teams:

- Westwood U.S. Equities (**Dallas**): a range of U.S. Value, Multi-Asset and Master Limited Partnership (MLP) strategies.
- Westwood International Advisors (**Toronto**): Emerging Markets and Global equity strategies.
- Westwood Convertible Securities (**Boston**): Global Convertible Securities as well as a Market Neutral Income strategy.

Prior to joining Westwood, Mr. Dale spent 15 years with SEI, Investment Manager Services Division. Most recently he served as Distribution Director, responsible for assisting numerous asset management firms create, promote and negotiate their mutual funds and ETFs to key decision makers at major financial intermediaries. Mr. Dale received his BSBA in Business Management from West Virginia University. He is a Certified Financial Planner™, Chartered Financial Consultant and Registered Securities Representative (FINRA Series 7 and 63).

### About Westwood

Westwood Holdings Group, Inc. provides investment management services to institutional investors, private wealth clients and financial intermediaries. With \$23.1 billion in assets under management including \$4.3 billion in mutual funds (as of June 30, 2015), the firm manages a range of investment strategies including U.S. equities, Master Limited Partnerships (MLPs), Multi-Asset, Global and Emerging Markets equities, and Global Convertible securities portfolios. Access to these strategies is available through separate accounts, commingled funds, the Westwood Funds® family of mutual funds, and UCITS funds. 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, Omaha and Houston.

For more information about Westwood, please visit our website at [www.westwoodgroup.com](http://www.westwoodgroup.com).

For more information on Westwood Funds, please visit us at [www.westwoodfunds.com](http://www.westwoodfunds.com).

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