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Form ADV Part 2B Brochure Supplement for:

Brooke A. Bees
Andrew N. Davis
Timothy M. Macarak
Raymond J. McCaffrey
David A. Navarro
Erik W. O'Neal
Robert J. Schneider
Balaj Singh

This brochure supplement provides information on our personnel listed above that supplements the West Capital Management (WSFS Capital Management D/B/A West Capital Management) ADV Part 2 Brochure. You should have received a copy of the Brochure. Please contact Harrison Gelber, Chief Compliance Officer, at HGelber@wsfsbank.com if you did not receive West Capital Management Inc.'s Brochure or if you have any questions about the contents of the Supplement. Please contact Robert Schneider at rschneider@westcapital.com with any questions regarding overall responsibility for supervision of the services provided to clients of the Firm.

Additional information about the above individuals is available on the SEC's website at www.adviserinfo.sec.gov.

July 1, 2020

Item 2- Educational Background and Business Experience

Name: Brooke A. Bees

Born: 1975

Education: Bachelor of Science in International Business – Pennsylvania State University 1998

Bachelor of Science in Business Management – Pennsylvania State University 1998

Business Background: Ms. Bees is an Advisor at West Capital Management, having joined the firm in 2019. Collaborating with all departments at West Capital Management, Brooke works with individuals, families, and institutional clients to help them meet their financial goals and solve complex planning issues. Prior to West Capital, Brooke was a Client Advisor and Branch Manager at Mercer Advisors (2011-2019) where she was responsible for introducing new and prospective clients to Mercer, managing client relationships, as well as overseeing the design and implementation of her client's financial plans.

Ms. Bees is a Certified Financial Planner™ and is also a Certified Trust Financial Advisor. Please see the last page of this brochure for important disclosure information regarding these designations.

Item 3- Disciplinary Information

Registered investment advisers are required to disclose all material facts regarding any legal or disciplinary events that would be material to your evaluation of West Capital Management or its representatives. West Capital Management has no information applicable to this Item relating to Ms. Bees.

Item 4- Other Business Activities

Ms. Bees is not actively engaged in any other investment related business or occupation.

Item 5- Additional Compensation

Ms. Bees does not receive an economic benefit for providing advisory services from someone who is not a client of the firm.

Item 6 - Supervision

West Capital Management assigns each of its representatives to a designated supervisor. The Firm's President, Robert J. Schneider, has overall responsibility for supervision of the services provided to clients of the Firm. The Firm monitors the activities of its representatives, including recommendations, transactions, investment suitability, and compliance with any restrictions imposed by the client, by observation, review of email and correspondence, and through other means. Mr.

Schneider's contact information is located on the cover page of the West Capital Management Brochure and on the cover page of this Supplement.

Item 2- Educational Background and Business Experience

Name: Andrew N. Davis
Born: 1986
Education: Bachelor of Arts in Economics, Michigan State University
Master of Arts, Applied Economics and Graduate Certificate in Financial Management, John Hopkins University

Business Background: Mr. Davis joined WSFS Capital Management, LLC d/b/a West Capital Management (“West Capital Management”) in May 2019. Mr. Davis is a Research Analyst of West Capital Management’s Research Team and also serves on West Capital Management’s Investment Committee. Mr. Davis is responsible for due diligence on managers/strategies, portfolio construction, and portfolio implementation. Prior to joining West Capital Management, Mr. Davis was a Portfolio Strategist at SEI Investments (2015-2019) and an Economist at Moody’s Analytics (2012-2015). Andrew began his career as an Economist at the Bureau of Labor Statistics. Mr. Davis holds the Chartered Financial Analyst (CFA®) designation; please see last page of this brochure for important disclosure information regarding this designation.

Item 3- Disciplinary Information

Registered investment advisers are required to disclose all material facts regarding any legal or disciplinary events that would be material to your evaluation of West Capital Management or its representatives. West Capital Management has no information applicable to this Item relating to Mr. Davis.

Item 4- Other Business Activities

Mr. Davis is not actively engaged in any other investment related business or occupation.

Item 5- Additional Compensation

Mr. Davis does not receive an economic benefit for providing advisory services from someone who is not a client of the firm.

Item 6 - Supervision

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by the client, by observation, review of email and correspondence, and through other means. Mr. Schneider's contact information is located on the cover page of the West Capital Management Brochure and on the cover page of this Supplement.

Item 2- Educational Background and Business Experience

Name: Timothy M. Macarak

Born: 1977

Education: Bachelor of Arts in Political Science – Temple University 2004

Business Background: Mr. Macarak is an Advisor at West Capital Management, having joined the firm in 2014. Collaborating with all departments at West Capital Management, Tim works with individuals, families, and institutional clients to help them meet their financial goals and solve complex planning issues. Prior to West Capital, Tim was a Regional Director for Lockwood Advisors, a Bank of New York Company, where he provided investment advice, and practice management solutions to financial advisors, registered investment advisors and broker/dealers (2009-2014). Tim's responsibilities also included identifying and executing on key marketing opportunities and strategies. Prior to Lockwood, Tim also held roles at TD Ameritrade and Piper Jaffray. Tim is a Certified Financial Planner™; please see last page of this brochure for important information regarding this designation.

Item 3- Disciplinary Information

Registered investment advisers are required to disclose all material facts regarding any legal or disciplinary events that would be material to your evaluation of West Capital Management or its representatives. West Capital Management has no information applicable to this Item relating to Mr. Macarak.

Item 4- Other Business Activities

Mr. Macarak is not actively engaged in any other investment related business or occupation.

Item 5- Additional Compensation

Mr. Macarak does not receive an economic benefit for providing advisory services from someone who is not a client of the firm.

Item 6 - Supervision

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Schneider's contact information is located on the cover page of the West Capital Management Brochure and on the cover page of this Supplement.

Item 2- Educational Background and Business Experience

Name: Raymond J. McCaffrey

Born: 1963

Education: Master of Business Administration, Tepper School of Business, Carnegie- Mellon University

BS Economics- Villanova University

Business Background: Mr. McCaffrey is an Investment Adviser Representative at West Capital Management, having joined the firm in 2020. In addition to his responsibilities at West Capital, since 2015 Mr. McCaffrey serves as Chief Investment Officer at Cypress Capital Management, an affiliate of West Capital under the same parent company. Prior to joining West Capital and Cypress Capital, Mr. McCaffrey served as a Co-Founder at FourScore Income Partners L.P. (2013-June 2015), a Managing Member of McCaffrey Management, LLC (2005-April 2013), as a Portfolio Manager at Pilgrim Baxter & Associates (1997-2004), a Portfolio Manager/Analyst at Pitcairn Trust Company (1996-1997), a Director of Equity of Research/Portfolio Manager at Cypress Capital Management (1992-1996), an Investment Analyst at Penn Mutual Life Insurance (1990-1992), and a Research Analyst at Fidelity Bank (1987-1990).

Additionally, Ray is a Chartered Financial Analyst™; please see last page of this brochure for important information regarding this designation.

Item 3- Disciplinary Information

Registered investment advisers are required to disclose all material facts regarding any legal or disciplinary events that would be material to your evaluation of West Capital Management or its representatives. West Capital Management has no information applicable to this Item relating to Mr. McCaffrey.

Item 4- Other Business Activities

As noted above, Mr. McCaffrey is actively engaged as the Chief Investment Officer of Cypress Capital Management, an affiliate of West Capital. Mr. McCaffrey is also a Registered Investment Adviser representative of Cypress Capital Management. West Capital has procedures in place to ensure that any recommendation made are in the best interest of its clients and that proper information barriers are in place.

Item 5- Additional Compensation

Mr. McCaffrey receives compensation from Cypress Capital Management, an affiliate of West Capital, where he serves as Chief Investment Officer and an Investment Adviser Representative.

Item 6 - Supervision

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Item 2- Educational Background and Business Experience

Name: David A. Navarro

Born: 1977

Education: Bachelor of Science in Finance, Rutgers University

Business Background: Mr. Navarro joined WSFS Capital Management, LLC d/b/a West Capital Management (“West Capital Management”) in August 2018. Mr. Navarro is responsible for due diligence on managers/strategies, portfolio construction, and portfolio implementation. David has 18 years of industry experience, joining West Capital Management from a wealth management firm where he was a Portfolio Manager, Analyst responsible for designing and analyzing client portfolios. David’s career began with nine years at Bear Stearns (1999-2006). David has earned the Chartered Financial Analyst (“CFA”) designation; please see last page of this brochure for important disclosure information regarding this designation.

Item 3- Disciplinary Information

Registered investment advisers are required to disclose all material facts regarding any legal or disciplinary events that would be material to your evaluation of West Capital Management or its representatives. West Capital Management has no information applicable to this Item relating to Mr. Navarro.

Item 4- Other Business Activities

Mr. Navarro is not actively engaged in any other investment related business or occupation.

Item 5- Additional Compensation

Mr. Navarro does not receive an economic benefit for providing advisory services from someone who is not a client of the firm.

Item 6 - Supervision

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Schneider's contact information is located on the cover page of the West Capital Management Brochure and on the cover page of this Supplement.

Item 2- Educational Background and Business Experience

Name: Erik W. O'Neal

Born: 1985

Education: Bachelor of Sociology, West Virginia University- 2007

Business Background: Mr. O'Neal is an Advisor at West Capital Management, having joined the firm in 2013. Erik works with individuals, families, and institutional clients to help them meet their financial goals and solve complex planning issues. Prior to joining West Capital Management, Erik had been in the financial industry for 8 years and had held key roles at Metlife (2007-2011) and at a leading independent financial services company (2012-2013). Erik has completed study at the Wharton School of the University of Pennsylvania for the Certified Investment Management Analyst (CIMA®) and is a member of the Investments and Wealth Institute. Please see last page for important disclosures regarding these designations.

Item 3- Disciplinary Information

Registered investment advisers are required to disclose all material facts regarding any legal or disciplinary events that would be material to your evaluation of West Capital Management or its representatives. West Capital Management has no information applicable to this Item relating to Mr. O'Neal.

Item 4- Other Business Activities

Mr. O'Neal is not actively engaged in any other investment related business or occupation.

Item 5- Additional Compensation

Mr. O'Neal does not receive an economic benefit for providing advisory services from someone who is not a client of the firm.

Item 6 - Supervision

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Item 2- Educational Background and Business Experience

Name: Robert J. Schneider

Born: 1962

Education: Bachelor of Science, Business Administration, LaSalle University- 1985

Recent Business Background. Schneider is President and Chief Operating Officer (COO) at West Capital Management, having joined the firm in 2019. He joined West Capital Management from Goldman Sachs (United Capital Financial Advisors prior to acquisition by Goldman) (2019). Mr. Schneider spent eighteen (18) years at Conservest Capital Advisors, a Registered Investment Advisory firm in Wynnewood, PA where he served as Managing Director, Chief Compliance Officer, and Senior Portfolio Manager (2000-2018).

Item 3- Disciplinary Information

Registered investment advisers are required to disclose all material facts regarding any legal or disciplinary events that would be material to your evaluation of West Capital Management or its representatives. West Capital Management has no information applicable to this Item relating to Mr. Schneider.

Item 4- Other Business Activities

Mr. Schneider serves on the Board of WSFS Wealth Management, LLC d/b/a Powder Financial, an affiliated entity of West Capital Management.

Item 5- Additional Compensation

Mr. Schneider does not receive an economic benefit for providing advisory services from someone who is not a client of the firm, other than as disclosed under Item 4 above.

Item 6 - Supervision

Mr. Schneider is supervised by Arthur Bacci, Executive Vice President and Chief Wealth Officer of WSFS Bank, who can be reached by telephone at 302-504-1407.

West Capital Management supervises its personnel and the investments made in client accounts. West Capital Management monitors the investments recommended by Robert Schneider to ensure those investments are suitable for the particular client and consistent with their investment needs, goals, objectives, and risk tolerance, as well as any restrictions previously requested by the clients. West Capital Management periodically reviews the advisory activities of Robert Schneider, which may include reviewing individual client accounts and correspondence (including emails) sent to and received by Robert Schneider.

Item 2- Educational Background and Business Experience

Name: Balaj Singh

Born: 1994

Education: Bachelor of Science in Finance and Accounting (minor in Economics) – Rutgers University- 2016

Business Background. Singh joined West Capital in 2019 Research Analyst on West Capital Management’s Research Team and supports West Capital Management’s Investment Committee. Mr. Singh is responsible for investment due diligence on managers and strategies, portfolio construction, and performance reporting. Prior to joining West Capital Management, Mr. Singh was a Senior Stock Options Associate at Broadridge Financial Solutions, Inc. (2017-2019) and a Client Service Analyst at Hamilton Lane Advisors (2016-2017). Mr. Singh has earned the CAIA® Designation and is currently a Level III Candidate in the CFA® program; please see the last page of this brochure for important disclosure information regarding these designations.

Item 3- Disciplinary Information

Registered investment advisers are required to disclose all material facts regarding any legal or disciplinary events that would be material to your evaluation of West Capital Management or its representatives. West Capital Management has no information applicable to this Item relating to Mr. Singh.

Item 4- Other Business Activities

Mr. Singh is not actively engaged in any other investment related business or occupation.

Item 5- Additional Compensation

Mr. Singh does not receive an economic benefit for providing advisory services from someone who is not a client of the firm.

Item 6 - Supervision

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Definitions of Designations

Chartered Financial Analyst (CFA):

The CFA charter is a globally respected, graduate-level investment credential established in 1962 and awarded by CFA Institute — the largest global association of investment professionals. To earn the CFA charter, candidates must:

- pass three sequential, six-hour examinations;
- have at least four years of qualified professional investment experience;
- join CFA Institute as members; and
- commit to abide by, and annually reaffirm, their adherence to the CFA Institute Code of Ethics and Standards of Professional Conduct.

Certified Financial Planner (CFP)[®]:

Certified Financial Planners are licensed by the CFP[®] Board. CFP[®] certification requirements:

- Bachelor's Degree from an accredited college or university
- Completion of the financial planning education requirements set by the CFP[®] Board (www.cfp.net).
- Must pass the comprehensive CFP[®] Certification Examination
- Pass CFP[®] Board's Fitness Standards for Candidates and Registrants
- Agree to abide by CFP[®] Board's Code of Ethics and Professional Responsibility which puts clients' interests first
- Comply with the Financial Planning Practice Standards which spell out what clients should be able to reasonably expect from the financial planning engagement.

Certified Trust and Financial Advisor (CTFA)[®]:

Issued by the ABA Institute of Certified Bankers, the candidate must meet one of the following requirements:

- Three years of wealth management experience plus ICB-approved training program; or
- Five years of personal trust experience and a bachelor's degree; or
- 10 years of personal trust experience

The candidate must pass a final certification exam and obtain 45 credits of continuing education each year with a minimum of six hours in each of four knowledge areas.

Certified Investment Management Analyst (CIMA)[®]:

Certified Investment Management Analyst certifications are offered and recognized by the Investments and Wealth Institute. CIMA[®] Candidates must meet the following requirements:

- Three years of financial services experience; and
- A satisfactory record of ethical conduct, as determined by Investments & Wealth Institute Admissions Committee.
- Educational component offered by one of the approved Registered Education Providers.

- In-class program at the Wharton School, University of Pennsylvania or online through Yale School of Management

To obtain a certification, you must pass a qualification examination and certification examination and complete 40 hours of Continuing Education every two years.

Chartered Alternative Investment Analyst (CAIA)[®]:

Chartered Alternative Investment Analyst certifications are offered and recognized by the Chartered Alternative Investment Analyst Association. CIMA[®] Candidates must meet one of the following requirements:

- Bachelor's or equivalent degree and more than one year of business experience in the financial industry; or
- Four years of experience in the financial industry

A self-study certification program requires the successful completion of both the Level I and Level II examinations. There is a continuing education requirement of the completion of a self-evaluation tool every three years.

[For additional information about these credentials, please refer directly to the website of the issuing organization.](#)