



WEST CAPITAL MANAGEMENT

West Capital Management Privacy Policy

Rev. April 2020

Facts	What does West Capital Management do with your financial information?
Why?	Financial companies choose how they share your personal information. Federal law gives consumers the right to limit some but not all sharing. Federal law also requires us to tell you how we collect, share, and protect your personal information. Please read this notice carefully to understand what we do.
What?	<p>The types of personal information we collect and share depends on the type of service you have with us. This information can include:</p> <ul style="list-style-type: none"> - Social Security number and income - Account balances and assets - Transaction history and investment experience <p>When you are <i>no longer</i> our Customer, we continue to share your information as described in this notice.</p>
How?	All financial companies need to share customers' personal information to run their everyday business. In the section below, we list the reasons financial companies can share their Customers' personal information; the reasons West Capital Management chooses to share; and whether you can limit this sharing.

Reasons we can share your personal information	Does West Capital Management share?	Can you limit this sharing?
For our everyday business purposes – such as to process your transactions, maintain your account(s), respond to court orders and legal investigations, or report to credit bureaus	Yes	No
For our marketing purposes – to offer our products and services to you	Yes	No
For joint marketing with other financial companies	No	We don't share
For our affiliates' everyday business purposes – information about your transactions and experiences	Yes	No
For our affiliates' everyday business purposes – information about your creditworthiness	Yes	No
For our affiliates to market to you	No	We don't share
For nonaffiliates to market to you	No	We don't share

Questions?	Call 215-731-1820 or go to www.westcapital.com
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WEST CAPITAL MANAGEMENT

Who We Are

Who is providing this notice?

West Capital Management

What We Do

How does West Capital Management protect my personal information?

To protect your personal information from unauthorized access and use, we use security measures that comply with federal law. These measures include computer safeguards and secured files and building.

How does West Capital Management collect my personal information?

We collect your personal information, for example, when you:

- Open an account
- Deposit money
- Seek advice about your investments
- Enter into an investment advisory contract
- Tell us about your investment or retirement portfolio or earnings

We also collect your personal information from other companies.

Why can't I limit all sharing?

Federal laws give you the right to limit only:

- Sharing for affiliates' everyday business purposes - information about your creditworthiness
- Affiliates from using your information to market to you
- Sharing for nonaffiliates to market to you

State laws and individual companies may give you additional rights to limit sharing.

Definitions

Affiliates

Companies related by common ownership and control. They can be financial and nonfinancial companies.

- *Our affiliates include companies with the WSFS name and any other WSFS subsidiaries.*

Nonaffiliates

Companies not related by common ownership and control. They can be financial or nonfinancial companies.

- *West Capital Management does not share with nonaffiliates so that they can market to you.*

Joint marketing

A formal agreement between nonaffiliated financial companies that together market financial products or service to you.

- *West Capital Management does not jointly market.*

**WSFS Capital Management
DBA West Capital Management**

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