

Privacy Policy

Our Commitment to You

West Branch Capital LLC (“West Branch Capital”) is committed to safeguarding the use of your personal information that we have as your Investment Advisor.

West Branch Capital (also referred to as "we", "our" and "us" throughout this notice) protects the security and confidentiality of the personal information we have and implements controls to ensure that such information is used for proper business purposes in connection with the management or servicing of our relationship with you. Our relationship with you is our most important asset. We understand that you have entrusted us with your private information, and we do everything that we can to preserve that trust.

West Branch Capital does not sell your non-public personal information to anyone. Nor do we provide such information to others except for appropriate business purpose in connection with the servicing and management of our relationship with you, as discussed below.

Details of our approach to privacy and how your personal non-public information is collected and used are set forth in this Privacy Policy.

Why you need to know

West Branch Capital shares some of your personal information. Federal and State laws give you the right to limit some of this sharing. Federal and State laws require West Branch Capital to disclose how we collect, share, and protect your personal information.

What information do we collect from you?

- Social Security or taxpayer ID number
- Name, address and phone number(s)
- Email address(es)
- Account information (including other institutions)
- Assets and liabilities
- Income and expenses
- Investment activity
- Investment experience and goals

What sources do we collect information from in addition to you?

- Custody, brokerage, and advisory agreements
- Other advisory agreements and legal documents
- Transactional information with us or others
- Account applications and forms
- Investment questionnaires and suitability documents
- Other information needed to service account

How do we protect your information?

To safeguard your personal information from unauthorized access and use, we maintain physical, procedural and electronic safeguards. These include computer safeguards such as passwords, as well as secured files and buildings. Our employees are advised about West Branch Capital's need to respect the confidentiality of each

Client’s non-public personal information. We train our employees on their responsibilities. We require third parties who handle your personal information to sign a confidentiality agreement and/or are required to hold your personal information confidential.

How we share your information

West Branch Capital does need to share personal information regarding its Clients to effectively implement services. In the section below, we list some reasons we may share your personal information.

| Basis For Sharing | Sharing | Limitations |
|--|---|---|
| <p>Servicing our Clients We may share non-public personal information with non-affiliated third parties (such as brokers, Custodians, regulators, credit agencies, other financial institutions) as necessary for us to provide agreed upon services to you, consistent with applicable law, including but not limited to: processing transactions; general account maintenance; responding to regulators or legal investigations; and credit reporting.</p> | <p>West Branch Capital may share this information.</p> | <p>Clients cannot limit the Advisor’s ability to share.</p> |
| <p>Administrators We may disclose your non-public personal information to companies we hire to help administer our business. Companies that we hire to provide services of this nature are not allowed to use your personal information for their own purposes and are contractually obligated to maintain strict confidentiality. We limit their use of your personal information to the performance of the specific service we have requested.</p> | <p>West Branch Capital may share this information.</p> | <p>Clients cannot limit the Advisor’s ability to share.</p> |
| <p>Marketing Purposes West Branch Capital does not disclose, and does not intend to disclose, personal information with non-affiliated third parties to offer you services. Certain laws may give us the right to share your personal information with financial institutions where you are a customer and where West Branch Capital or the Client has a formal agreement with the financial institution. We will only share information for purposes of servicing your accounts, not for marketing purposes.</p> | <p>West Branch Capital does not share personal information.</p> | <p>Clients cannot limit the Advisor’s ability to share.</p> |
| <p>Authorized Users In addition, your non-public personal information may also be disclosed to you and persons that we believe to be your authorized agent or representative.</p> | <p>West Branch Capital does share personal information.</p> | <p>Clients can limit the Advisor’s ability to share.</p> |
| <p>Information About Former Clients West Branch Capital does not disclose, and does not intend to disclose, non-public personal information to non-affiliated third parties with respect to persons who are no longer our Clients.</p> | <p>West Branch Capital does not share personal information regarding former Clients</p> | <p>Clients can limit the Advisor’s ability to share.</p> |

State-specific Regulations – Massachusetts

In response to a Massachusetts law, Clients must “opt-in” to share non-public personal information with non-affiliated third parties before any personal information is disclosed. We may disclose non-public personal information to other financial institutions with whom we have joint business arrangements for appropriate business purpose in connection with the management or servicing of your account.

Changes to our Privacy Policy

We will send you a notice of our Privacy Policy annually for as long as you maintain an ongoing relationship with us.

Periodically we may revise our Privacy Policy, and will provide you with a revised policy if the changes materially alter the previous Privacy Policy. We will not, however, revise our Privacy Policy to permit the sharing of non-public personal information other than as described in this notice unless we first notify you and provide you with an opportunity to prevent the information sharing.