Privacy Notice (Regulation S-P) -

17CFR Part 248, Subpart A – Initial and Annual Notice
Rev. 08/06/2026

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", and "our" throughout this notice) protects the security and confidentiality of the non-public 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 purposes 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 Notice.

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.

Information We Collect

In the course of providing investment advisory services, we collect non-public personal information about you from the following sources:

- Information you provide on applications, agreements, planning questionnaires, and suitability documents – such as your name, address, phone number, email address, Social Security number or Taxpayer ID, income and expenses, assets and liabilities, and investment objectives.
- Information about your transactions with us, our affiliates, your account custodian, or others – such as account balances, holdings, transaction history, investment experience and goals.
- Information received from third parties you authorize – such as your accountant, attorney, or prior advisor.
- Other information needed to service the account.

How we Use and Share 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 why we may share your personal information.

Basis For Sharing	**Sharing**	**Limitations**
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.	West Branch Capital may share this information.	Clients cannot limit the Advisor's ability to share.
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.	West Branch Capital may share this information.	Clients cannot limit the Advisor's ability to share.
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.	West Branch Capital does not share personal information.	Not applicable – West Branch Capital does not share personal information for marketing purposes.
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.	West Branch Capital does share personal information.	Clients can limit the Advisor's ability to share.
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.	West Branch Capital does not share personal information regarding former Clients	Clients can limit the Advisor's ability to share.

How Do We Protect Your Information?

To safeguard your personal information from unauthorized access and use, we maintain physical, procedural and electronic safeguards as required by Regulation S-P. These include access controls limiting information to personnel who need it, multifactor authentication and encryption of our systems, secured files and buildings, oversight of service providers with access to customer information, secure disposal of records, and a written incident response program. If an incident involving your sensitive information occurs, we will notify you as required by law – generally within 30 days of becoming aware that unauthorized access to or use of your sensitive information has occurred or is reasonably likely to have occurred. Our employees are trained to maintain the confidentiality of each Client's non-public personal information. We require third parties who handle your personal information to sign a confidentiality agreement and/or are required to hold your personal information confidential.

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 purposes in connection with the management or servicing of your account.

Changes to our Privacy Notice

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 sharing of information. If you have questions about this notice or our privacy practices, contact Ayaz Mahmud, CEO/CCO at (833) 888-0534 or info@westbranchcapital.com.