

West Chester Capital Advisors, Inc. values our relationship with you and considers your privacy an important priority in maintaining that relationship. We are committed to protecting the security and confidentiality of your personal information.

SOURCES OF INFORMATION

We collect nonpublic personal information about you from the following sources:

- Information we receive from you, or your broker-dealer, investment adviser or financial representative through interviews, applications, agreements or other forms
- Information about your transactions with us, our affiliates or others
- Information we receive from your inquiries by mail, e-mail or telephone

INFORMATION COLLECTED

The type of data we collect may include your name, address, social security number, age, financial status, assets, income, tax information, retirement and estate plan information, transaction history, account balance, payment history, investment objectives, marital status, family relationships and other personal information.

DISCLOSURE OF INFORMATION

We do not disclose any nonpublic personal information about our customers or former customers except as permitted by law. These permitted uses include the disclosure of such information to unaffiliated financial service providers and other companies for the following reasons:

- In order to provide you with products and services and to effect transactions that you request or authorize, we may disclose your personal information as described above to unaffiliated financial service providers and other companies that perform administrative or other services on our behalf, such as transfer agents, custodians and trustees, or that assist us in the distribution of investor materials such as trustees, banks, financial representatives, proxy services, solicitors and printers.
- We may also release such information about you if you direct us to do so, if we are compelled by law to do so, or in other legally limited circumstances (for example, to protect your account from fraud).

RIGHT TO OPT OUT

West Chester Capital Advisors, Inc. does not sell or distribute nonpublic information to any third-party non-affiliates, except as noted above, those service providers to perform functions necessary to service your account. In addition, West Chester Capital Advisors, Inc. does not disclose any of our client's personal nonpublic information to any of its affiliates for the purpose of marketing their products and services. If, in the future, our business would direct us to do so, you will be notified and provided the opportunity to opt out of having this information shared.

CONFIDENTIALITY AND SECURITY

With regard to our internal security procedures, West Chester Capital Advisors, Inc. restricts access to your nonpublic personal information to those West Chester Capital Advisors, Inc. employees who need to know that information to provide products or services to you. We maintain physical, electronic and procedural safeguards to protect your nonpublic personal information.

POLICY UPDATES AND INQUIRIES

This privacy policy will be provided to you annually. We reserve the right to modify this policy at any time; however, you will be notified promptly of any material changes to this policy. For questions about our policy, please contact us at 814-533-5339.