

## **Privacy Policy**

West Oak Capital respects the privacy of our clients. We are committed to maintaining the confidentiality, integrity and security of our current, prospective and former clients' personal information.

In the course of providing our services, we may collect, retain and use client information for the purpose of administering our operations, providing client service and complying with legal and regulatory requirements. This information may come from account applications, investment policy statements, correspondence, verbal discussions and other sources, as well as from your brokerage firm, accountant, and other advisors.

We do not sell, exchange or disclose client information with outside organizations except as required by law. As is common in the industry, non-affiliated companies may from time to time be used to provide certain services, such as preparing reports, account statements and other information. These companies may have access to your personal and account information, but are permitted to use the information solely to provide the specific service or as otherwise permitted by law.

We do reserve the right to disclose or report personal information where we believe in good faith that disclosure is required under law, or to cooperate with regulators or law enforcement authorities. In addition, we may disclose information about you or your account to a non-affiliated third party at your written request.

We take seriously the obligation to protect your personal information. We maintain appropriate safeguards regarding client information, which includes the use of security procedures to prevent revealing client information.



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West Oak Capital, LLC ◆ 2801 Townsgate Road ◆ Suite 112 ◆ Westlake Village ◆ California ◆ 91361

PH 805.230.8282 ◆ FX 805.230.8283