

FACTS**WHAT DOES WestEnd Advisors, LLC
DO WITH YOUR PERSONAL 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?	The types of personal information we collect and share depend on the product or service you have with us. This information can include: <ul style="list-style-type: none"> ■ Social Security number and date of birth state of residence and assets ■ account balances and transaction history
How?	All financial companies need to share clients' personal information to run their everyday business. In the section below, we list the reasons financial companies can share their clients' personal information; the reasons WestEnd Advisors, LLC chooses to share; and whether you can limit this sharing.

Reasons we can share your personal information	Does WestEnd Advisors 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 do not 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	No	We do not share.
For nonaffiliates to market to you	No	We do not share.

Questions?	Call 704.556.9300 or go to westendadvisors.com
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Who we are**Who is providing this notice?**

WestEnd Advisors, LLC

What we do**How does WestEnd Advisors 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 buildings.

How does WestEnd Advisors collect my personal information?

We collect your personal information, for example, when you

- open an account or provide your contact information
- transfer an account or close an account
- have transactions in an account

Why can't I limit all sharing?

Federal law gives 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 or control. They can be financial and nonfinancial companies.

- *On December 31, 2021, Victory Capital Holdings, Inc. acquired WestEnd Advisors, LLC. WestEnd operates as an autonomous Victory Capital Investment Franchise.*

Nonaffiliates

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

- *WestEnd Advisors does not share clients' information with nonaffiliates.*

Joint marketing

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

- *WestEnd Advisors does not have any agreements with nonaffiliated financial companies to market financial products or services to you.*

Other important information

For Nevada Residents: Nevada law requires that we tell you about the option to be placed on our internal do-not-call list. If you'd rather not receive sales calls from us, please call **(888) 500.7501** or **(704) 556.9300** and ask to speak to a representative so we can place you on our do-not-call list.

You may also contact: Bureau of Consumer Protection Office of the Nevada Attorney General, 555 E. Washington Ave., Ste. 3900, Las Vegas, NV 89101, call 1-702-486-3132 or Email: BCPINFO@ag.state.nv.us.

For Vermont Residents: In accordance with Vermont law, we will not share information we collect about you with companies who are not affiliates, except as permitted by law, such as with your consent or to service your accounts. We will not share information about your creditworthiness with our affiliates without your authorization or consent, but we may share information about our transactions or experiences with you with our affiliates as permitted by law.

For California Residents: In accordance with California law, we will not share information we collect about you with nonaffiliates, except as allowed by law. For example, we may share information with your consent or to service your accounts. Among our affiliates, we will limit information sharing to the extent required by California law.

To discuss the aforementioned information or any other questions, please call us toll-free at (888) 500.7501 or (704) 556.9300 anytime between 8:30 a.m. and 5:00 p.m. Eastern Time, contact us at info@westendadvisors.com, or visit us at www.westendadvisors.com.

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