



# Our Approach to Artificial Intelligence

How Dentist Advisors uses AI in service of our clients

*Version 1.0 | Effective May 2026 | Reviewed annually*

## Our Commitment

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Dentist Advisors uses artificial intelligence to do more thorough work in less time, so the advisor on your account spends their hours on judgment and your relationship rather than on formatting drafts or shuffling data between systems. The recommendations you receive are shaped and approved by a human advisor who is accountable to you. This page explains how we use AI, the protections we have in place, and the choices available to you.

## How We Use AI in Your Engagement

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AI helps our team prepare financial reports, summarize lengthy documents, organize research, draft routine correspondence, and structure analyses faster than we could before. You may notice we deliver drafts more quickly, ask sharper follow-up questions earlier in an engagement, or catch issues in third-party reports we might previously have missed. The advisor on your account is the same person, simply better equipped to focus their time on the work that matters most to you.

## What Stays Human

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Every recommendation, financial analysis, and client-facing deliverable is reviewed and approved by a credentialed Dentist Advisors team member before it reaches you. AI assists; it does not advise. Your advisor's professional judgment, the planning conversation, and the relationship you have with our team are unchanged.

## How We Protect Your Data

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We use Claude by Anthropic on the Claude Teams plan as our AI platform. Under this arrangement:

- Your data is not used to train AI models.



- Access is limited to the Dentist Advisors team members assigned to your engagement.
- Interactions are encrypted in transit and at rest.
- We do not share client data with any AI vendor outside of our vetted, contracted provider.

Sensitive identifiers such as Social Security numbers, tax identification numbers, and financial account numbers are excluded from AI workflows. Where AI is used for analytical work, we apply internal anonymization standards before any client-identifying information is processed.

## What AI Will Never Do at Dentist Advisors

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- **Make a final recommendation.** A credentialed advisor reviews and signs off on every analysis and report before it reaches you.
- **Move money on your behalf.** AI will not place trades, send wires, initiate transfers, or execute any monetary transaction. Any movement of funds requires a human at Dentist Advisors.
- **Impersonate or misrepresent.** AI is not used to generate communications that misrepresent you, our team, or our firm.
- **Connect to unvetted systems.** AI is only connected to tools and platforms that have been formally reviewed and approved by our leadership team.

## Accountability and Questions

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This policy is owned by Wade Anderson, Head of AI Operations, and is reviewed annually by the Dentist Advisors leadership team. For questions about how AI is used at Dentist Advisors, or to report a concern, contact [support@dentistadvisors.com](mailto:support@dentistadvisors.com).

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## Frequently Asked Questions

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### Is my data used to train AI models?

No. Under our Claude Teams plan with Anthropic, client data is not used to train any AI model.

### Who at Dentist Advisors can see my information through AI tools?

Only the Dentist Advisors team members assigned to your engagement and our Compliance Team. Access mirrors the permissions already in place for your account.

### What happens if AI produces an error?

Every AI-assisted output is reviewed by a credentialed advisor before delivery, and our review process is designed to catch errors before they reach you. If a mistake nonetheless makes its



way into your materials, contact your advisor immediately. We will correct the work, review what happened internally, and take steps to prevent a recurrence.

**How will I know if this policy changes?**

We review this policy annually and post the current version on our website. If a material change is made between annual reviews, we will note it on this page and notify active clients by email.