How your firm handles client data with agentdatasync — one page for advisers and clients

What this is: your firm's AI assistants (the tools that help us prepare for meetings and answer service questions) need clean, reliable client data. agentdatasync is the system that cleans that data and controls what the assistants can see. It is **not** a CRM replacement — your firm's CRM stays exactly where it is.

What data is involved: your client profile and contact details, household links, account types and balances, and the notes your adviser keeps. Account numbers appear to assistants in **masked form** (last 4 digits only). Tax IDs are never shared with assistants at all.

Where it lives: a cleaned copy of the firm's CRM data, held securely and used only to answer your assistants' questions. The original CRM remains your firm's system of record and nothing is overwritten there silently — your firm approves every cleanup change first.

Who and what can read it: only the firm's own approved AI assistants, each with its own credential and its own permissions. An assistant can *read* information it needs for its task — for example, a meeting-prep assistant can see your profile and balances. No assistant can change, move, or delete anything.

What's logged: every question an assistant asks is written to an audit log — what was asked, which assistant asked, and what was returned. The firm's compliance officer reviews this log monthly.

What never happens: - No assistant can move money, place trades, or give you investment advice — they read, humans decide. - No assistant can change your data or contact you on its own. - Your data is **not used to train any AI model** — yours or anyone else's.

If there's ever a security incident: agentdatasync must notify your firm within **72 hours** so the firm can act fast, and if your information was affected, the firm will notify you within **30 days** — as federal rules require.

How to revoke it: tell your firm. Credential revocation cuts an assistant's access immediately, and if the firm leaves the service, your firm's data is securely deleted with written confirmation.