Chicory Wealth

Chicory Wealth AI Use Overview

At Chicory Wealth, we use AI tools that help us work more efficiently by lightening the load of administrative tasks and streamlining data analysis. Using these tools allows us to spend *more* of our time doing what technology never could: getting to know our clients, building deeper connections, and navigating the wonderful complexities of being human.

As a Chicory client, you deserve to know exactly how these tools fit into our work. Below is an overview of what we use AI for, what we don't, and how we keep your information safe and secure.

How We Use AI

We think of AI as a helpful tool that assists us with preparation and internal tasks. It never has the final word, and our team reviews all AI-informed output before it is ever shared with you.

- **Meeting preparation**: Gathering notes from our emails between meetings, recent account activity, and open items so your advisor arrives fully prepared.
- **Meeting notes**: Capturing notes during meetings so your advisor can focus fully on the conversation, not the keyboard.
- **Document summaries**: Reading and summarizing long documents such as trusts, account statements, and insurance illustrations to help inform planning meetings and advice.
- **Scenario planning**: Modeling various outcomes for complex situations; similar to existing planning software, but with more capability to incorporate our personalized notes.
- **Reminders and tasks**: Flagging open items and tasks so nothing slips through the cracks.

How We Do NOT Use AI

We believe the best use of AI is to enable deeper, more personal human experiences and advice. We do not use AI tools to replace the relationship you have with your advisor.

- **AI does not make decisions about your money**. Any recommendation, investment decision, and trade is made by your advisory team.
- **AI does not replace your advisor's judgment.** We treat AI output as a *tool*, not as a voice of reason.

Chicory Wealth

- **AI does not communicate with you**. Written communications, reports, and plans you receive will always come from your advisor or a member of the Chicory team.
- **AI does not act on its own**. All prompts, data input, and parameters are intentional and built manually by our team.

How We Protect Your Information

Protecting your personal information is of utmost importance to us. Here are the safeguards we use to ensure your data is secure.

- **Approved tools only**: Chicory follows industry-standard security audits for the AI tools we use.
- **A "walled garden" of information:** AI tools can only access information that exists inside of our closed Chicory database. AI is not permitted to receive or send data outside of our internal network, nor is it allowed to use our data to train outside models.

*Last Updated: October 2026