eMoney

INFORMATION AND SECURITY

Rules for the Responsible Use of Artificial Intelligence (AI)

Overview

At eMoney, we recognize the growing number of tools and technologies offering AI-enabled features. These advancements are exciting, and we encourage their exploration and use. However, this must be done in line with our Rules for Responsible AI Use and the AI Acceptable Use Policy. The guidelines below are aimed to provide you with practical advice for the safe and approved use of AI.

Things You Should Do

- **Compliance:** Before using any AI tool, think carefully and ensure you're in compliance with eMoney Advisor's policies and legal requirements.
- **Credentials:** Only use eMoney Advisor's enterprise credentials—not personal or trial ac-counts—to access approved AI systems.
- **Confidential Information:** Refer to the Data Classification and Handling Policy for guid-ance on what qualifies as Confidential Information before entering data into an AI tool.
- **Accuracy:** Always verify the accuracy of AI-generated content. Remember, AI may produce inaccurate or irrelevant information, and you are accountable for your work and decisions based on AI-generated content.
- **Editing:** Edit AI-generated content to ensure originality and avoid copyright issues. While AI can inspire ideas, any text or images you use must be original or properly licensed.
- **AI Regulations:** Stay updated by regularly reviewing this document, as AI technology and related rules evolve rapidly.
- **Vendor Engagement:** Coordinate with Procurement before engaging any vendors.
- **Software Approval:** Obtain prior approval from Information Security before downloading third-party apps or software on eMoney Advisor devices or personal devices used for business.
- **Approved Use:** Use eMoney Advisor-approved AI tools only for their designated purposes.
- **Legal Matters:** Contact the Legal team for legal advice or contract language instead of using public AI systems.

Teams You Should Involve

- **Procurement:** Involve Procurement at every stage when working with vendors or service providers. They will coordinate legal resources and liaise with Information Security as necessary.
- **Legal:** Consult the Legal team for copyright protection of AI creations. This area of law is rapidly changing.
- **Corporate Communications:** Contact Corporate Communications for any public communications about eMoney Advisor's use of AI.
- **Information Security:** Get advance approval from Information Security before downloading or connecting third-party apps or software to any eMoney Advisor device or personal device used for business. Only approved software is allowed. You can also reach out to this team with any questions regarding the appropriate use of AI at eMoney Advisor.

Things You Should NOT Do

- **Confidentiality:** Never input or share eMoney Advisor or client confidential information with any public AI system (e.g., ChatGPT Free) or unapproved AI tools. This could breach confidentiality obligations to clients, suppliers, and vendors.
- **Device Usage**: Do not use public or unapproved AI systems on eMoney Advisor devices or for work purposes on any device.
- **Registration:** Avoid using eMoney Advisor credentials to register for any public or unapproved AI systems.
- **Personal Information:** Do not enter personally identifiable information (PII) of employees, clients, or their customers into any AI system. This could violate confidentiality obligations.
- **Employment Decisions:** Do not use AI systems for employment or personnel decisions without prior approval from the Legal team.
- **Specialized Services:** Do not replace internal or external specialized services with public AI systems, such as using AI to develop computer code for eMoney Advisor.
- **Impersonation:** Never use AI to impersonate or clone the likeness or online presence of any individual in relation to your work. This could lead to fraud and legal or reputational risks for eMoney Advisor.