

SHARING YOUR
FINANCIAL DATA WITH AI

Millions are turning to AI for help with financial questions, but it can come with risks, either in the form of misinformation or exposing your data to thieves.

DON'T	DO
1 Share specific financial details like exact debt amounts or tax refund.	 Be vague. Use round numbers when providing financial information.
2 Ask for investment advice.	 Ask for sources and always verify information.
3 Assume that AI has your full financial picture. AI is known for providing blanket answers.	 Keep it general. Asking questions to understand basic financial topics can be a good use of AI.
4 Give identifying information like names, SSNs, or driver's license numbers.	 If you're wanting to give more personal information, it's time to talk to a professional.
5 Input transactional data like specific charges or recurring payments.	 Ask for publicly-available data you can compare to yours for insights.
6 Upload financial documents, even with sensitive information blacked out.	 Take those documents to a financial professional instead.

There are many variables when it comes to your financial picture, and those aren't taken into account in AI responses. Also, many AI tools use the information you provide to train and improve their models.

For information on protecting your financial data:
mycfsgroup.com/tech-cybersecurity



SIoux FALLS OFFICE

7408 S. Bitterroot Pl.
Sioux Falls, SD 57108
605.357.8553

HURON OFFICE

280 Dakota Ave. S.
Huron, SD 57350
605.352.9490

 **cfsteam@mycfsgroup.com**

 **mycfsgroup.com**

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