

# Privacy Policy

**Effective Date: 11/19/2025**

This Privacy Policy explains how DATAFORGE AI, LLC (“Company”, “we”, “our”, or “us”) collects, uses, shares, and protects information when you use our analytics and advisory services, applications, website, and associated services (collectively, the “Services”). By using the Services, you agree to the collection and use of information as described in this Privacy Policy.

## §1 Information We Collect

**1.1 Client Data.** When you authorize our application to access your accounting platform (for example, QuickBooks Online (“QBO”) or Sage), we collect read-only financial and operational data (such as customer information, invoices, transaction records, chart of accounts and related metadata). We also collect any data you upload or provide directly to us in connection with the Services (“Client Data”). Client Data is considered your confidential information.

**1.2 Account Information.** We collect contact information (such as your name, email address, phone number, company name, and address) when you create an account, request support, or otherwise interact with us. We may also collect payment information for billing purposes if you subscribe to paid services.

**1.3 Usage Information.** We collect information about how you use the Services, such as IP addresses, browser type, pages visited, date and time stamps, and other usage analytics. We use cookies or similar technologies to collect some of this information and to authenticate you when you log in.

## §2 How We Use Information

**2.1 To Provide and Improve the Services.** We use your information to operate, maintain and improve the Services and to generate insights and reports. This includes retrieving Client Data from QBO, Sage or other platforms and storing it in separate encrypted SQLite databases within Saturn Cloud, processing it through our algorithms to derive insights, generating SQL queries using ChatGPT Pro (business) on non-client-specific information (we do not feed your raw data into AI models), and providing reports to you via our website, email or through your own Tableau account or OneDrive. We may also use Supabase to hold tokens and contact details during onboarding and Google Maps to convert addresses into coordinates. All API calls are configured with read-only scopes so we cannot modify or initiate transactions in your accounting platform.

**2.2 To Communicate with You.** We use your contact information to send you administrative notifications (e.g., service updates, security alerts, invoices) and to respond to your requests for support.

**2.3 Analytics and Performance.** We use usage information to monitor and analyze trends, usage and activities in connection with our Services and to improve our user experience. This data is aggregated and does not identify individual users.

**2.4 Legal and Compliance.** We may use your information to comply with laws, regulations, legal processes or governmental requests; to enforce our agreements; to protect our rights and the rights of others; and to detect, prevent or address security or technical issues. As a business that handles financial information we comply with the Gramm–Leach–Bliley Act (“GLBA”), the FTC Safeguards Rule, the Arkansas Personal Information Protection Act and other state consumer privacy laws. We are not a practicing CPA firm and do not perform attest, tax or accounting services, but we voluntarily follow applicable AICPA consulting standards and retain data only as required by law or professional guidelines.

**2.5 No Sale or Unauthorized Use.** We do not sell, rent, or otherwise share your personal information or Client Data with third parties for marketing or other independent purposes. We use Client Data solely to provide the Services as described in this Policy. We may retain anonymized, non-identifiable aggregated metrics, database

schema, query code, and non-identifiable testimonials strictly for internal analysis, security auditing, quality improvement, and product development. Any anonymized or aggregated information we retain:

- cannot identify you or your business,
- is not derived or used to analyze, compare, benchmark, or evaluate Intuit, QuickBooks, Sage, or any accounting platform,
- is not combined with other clients' identifiable data, AND
- is never sold or shared externally.

All retained anonymized material is used only internally and never in a manner that violates Intuit's Developer Terms of Service, including prohibitions on benchmarking or deriving competitive insights from platform data.

### §3 How We Share Information

**3.1 Service Providers.** We share information with third-party service providers that process information on our behalf to operate the Services, including trusted cloud hosting providers, analytics vendors and security service providers. These include, among others, Saturn Cloud (for secure computing environments), Supabase (for temporary storage of tokens and contact information), Vercel (for website hosting and OAuth callbacks), QuickBooks Developer and Sage (for read-only API access to your accounting data), Google APIs (Sheets and Maps), Microsoft OneDrive and Tableau (for report storage and visualization), and OpenAI (ChatGPT Pro) for generating query logic. Our service providers may have access to Client Data only as needed to perform their services and are contractually obligated to protect it. We do not send raw Client Data to ChatGPT Pro or any other AI engine; only anonymized schema or query parameters are used.

**3.2 Legal and Compliance.** We may disclose information if required to do so by law or in response to valid requests by public authorities (e.g., a court, government agency or software company audit). We also acknowledge that Intuit may audit our application and data-handling practices for compliance with Intuit's Developer Terms of Service, and we will cooperate with such audits as required.

**3.3 Business Transfers.** If we are involved in a merger, acquisition or asset sale, your information may be transferred as part of that transaction. We will provide notice before your information becomes subject to a different privacy policy.

### §4 Data Security

We use reasonable administrative, technical and physical safeguards to protect information from unauthorized access, disclosure, alteration and destruction. These measures include encrypting Client Data at rest and in transit, storing API credentials as environment variables (never in source code), segregating each client's data in a dedicated Saturn Cloud environment, limiting access to personnel with multi-factor authentication and logging, and monitoring for unauthorized access. Despite these safeguards, no method of transmission over the internet or method of electronic storage is entirely secure; therefore, we cannot guarantee absolute security.

### §5 Data Retention

We retain Client Data only as long as necessary to provide the Services or as required by applicable law, regulation, or professional standards. When your account is terminated or you revoke our access to your accounting platform (e.g., by using the QuickBooks disconnect button or by contacting us), we delete Client Data and derived insights from Saturn Cloud, Supabase, OneDrive, and our local systems within forty-eight (48) hours, except for:

- data we are legally required to retain,
- anonymized aggregated metrics,
- database schema and query code, and

- workpapers necessary to support our recommendations.

Any anonymized or aggregated information retained after disconnection:

- does not identify you or your business,
- is used only for internal analysis, product improvement, or security compliance,
- is never used for benchmarking Intuit, QuickBooks, Sage, or any platform, and
- is never sold or shared externally.

Aggregated analytics data that does not identify you may be retained indefinitely. We retain non-sensitive testimonials for marketing purposes only with your permission.

## **§6 Your Choices and Rights**

**6.1 Access, Update or Delete Information.** You may review, update or delete your account information by visiting our website and using the disconnect function at <https://www.dataforgeai.ai/connect-quickbooks> or by contacting us. If you revoke access to your accounting platform, we will stop retrieving Client Data and delete existing Client Data as described above.

**6.2 Opt-Out of Marketing Communications.** We currently do not send marketing communications. If we introduce marketing communications in the future, we will provide an opt-out mechanism.

**6.3 Cookies and Tracking Technologies.** Most browsers allow you to control cookies and other tracking technologies. If you disable cookies, some features of the Services may not function properly.

## **§7 International Transfers**

We store and process data in the United States. If you access our Services from outside the United States, you understand that your information may be transferred to, stored and processed in the United States. We will take steps to ensure that your information receives an adequate level of protection in the jurisdictions in which we process it.

## **§ 8 Children's Privacy**

Our Services are not directed to individuals under the age of 18. We do not knowingly collect personal information from children. If we learn that we have collected the personal information of a child under 18 without parental consent, we will take steps to delete the information as soon as possible.

## **§9 Changes to This Privacy Policy**

We may modify this Privacy Policy from time to time. If we make material changes, we will notify you through the Services or by other means and will indicate the date these terms were last updated. Your continued use of the Services after any changes indicates your acceptance of the revised policy.

## **§10 Contact Us**

If you have any questions about this Privacy Policy or our data practices, please contact us by visiting our website's FAQ page at <https://www.dataforgeai.ai/frequently-asked-questions>.