

Using Artificial Intelligence — responsibly, securely, and always with you in mind

Dear Valued Client,

You may have noticed that Artificial Intelligence — or “AI” — is becoming part of everyday life, from the apps on your phone to the tools businesses use behind the scenes. We’d like to share, in plain language, how Monarch Wealth Corporation thinks about this technology and what it means for you. Our promise is simple: we embrace tools that help us serve you better, and we do it carefully.

People make the decisions — always

AI is a helpful assistant, not a decision-maker. The advice you receive, the assessment of what’s suitable for you, and every recommendation about your investments continue to come from qualified professionals who apply their own judgment and experience. Anything AI helps prepare is reviewed and approved by a real person before it ever reaches you.

Protecting your information

Safeguarding your personal and financial information is a priority for us. We use AI only within secure, approved environments and apply rigorous privacy and cybersecurity standards designed to keep your information protected. Maintaining your confidentiality and upholding our duty of care to you remain central to how we work.

Our commitment to you

No matter what tools we use, our commitment to you remains central to how we work. We take responsibility for the advice we provide and the care we bring to your accounts, and we strive to uphold the professional standards you expect of us. Technology, used thoughtfully, is meant to help us be a more responsive and thorough partner — it is not a substitute for the human relationship at the heart of what we do.

Thank you for the confidence you place in us.

Warm regards,

Monarch Wealth

For additional information, please contact your advisor.