Paperless VA

A remote bookkeeping and payroll firm

AI USE & CLIENT PRIVACY POLICY

Paperless VA | Linda Hansen, Professional Bookkeeper

Effective Date: June 1, 2026

Last Revised: June 1, 2026

Paperless VA uses artificial intelligence (AI) tools to help deliver accurate, efficient bookkeeping services. This policy explains what that means for you — what AI I use, how I protect your information, and what I never do with your data.

1. Why I Use AI

AI tools help me work more efficiently on tasks like drafting communications, organizing information, reviewing documents, and researching accounting questions. The goal is always better, faster service for you.

Every output that touches your financials is reviewed and approved by me before it is acted upon. AI assists my judgment — it does not replace it.

2. What AI Tools I Use

I currently use the following AI tools in my practice:

- Claude (Anthropic) — drafting, research, document review, workflow automation
- QuickBooks AI features — built into my accounting software
- Other tools may be added. I will update this policy when they are.

If you would like current details on which tools are in use, just ask.

3. How I Protect Your Data

I take the following steps to keep your financial information confidential:

- I do not paste your business name, account numbers, tax ID, employee information, or other identifying details into any general-purpose AI tool (such as free versions of Claude, ChatGPT or similar public tools).
- When I use AI for tasks related to your account, I work with anonymized or generalized information wherever possible.
- The AI tools I use for professional work are configured with privacy-forward settings, including options that limit or prohibit the use of my inputs for AI training.
- I review and verify all AI-generated work before applying it to your books.
- Your data is stored only in systems I control or in software you have authorized (e.g., QuickBooks), protected by strong passwords and two-factor authentication.

4. What I Never Do

- Share your financial data with third parties through AI tools.
- Submit your sensitive identifying information into public AI chat interfaces.
- Use AI to make final decisions about your books without my own review and sign-off.
- Allow AI tools to store or access your full client file.

5. California Privacy Notice

Paperless VA operates as a sole proprietorship and does not meet the thresholds that trigger obligations under the California Consumer Privacy Act (CCPA/CPRA) — specifically, annual gross revenue over $25 million, or processing personal data of 100,000 or more California consumers. However, I voluntarily align my practices with the spirit of California's privacy standards:

- I collect only the client data needed to perform bookkeeping services.
- I do not sell your personal or financial information.
- I retain your data only as long as required by law or our service agreement.
- You may request a summary of what data I hold about your business at any time.

6. Your Right to Ask Questions or Opt Out

If you have questions about how AI is being used in your account, or if you prefer that I not use AI tools in any aspect of your bookkeeping, please contact me. I will accommodate reasonable requests and document your preference in your client file.

This policy does not limit any rights you have under your existing service agreement.

7. Contact

Linda Hansen

Paperless VA | Linda@PaperlessVA.com | 707-217-3962

This policy is effective June 1, 2026. Your continued use of Paperless VA services after that date constitutes your acceptance of this policy. Questions? Reach me at Linda@PaperlessVA.com or 707-217-3962.

Linda Hansen, Paperless VA

REVISION HISTORY

Rev. 1.0 — June 1, 2026 — Initial release

Rev. 1.1 — _____ — _____

Rev. 1.2 — _____ — _____