T-04.4 Data I never paste

Photocopy this page. Tape it next to the monitor. If a workflow needs one of these, replace it with a placeholder like "[buyer max]" before the brief goes in, and put the real value back by hand after.

Never paste into any AI tool, business account or not:

- Social Security numbers and any other government ID number (driver's license, passport, ITIN)
- Bank, loan, credit card, and account numbers; routing numbers; wire instructions
- A client's financial position, pre-approval amount, income, or credit information
- Offer terms, buyer limits, seller bottom lines, and negotiation positions before the deal closes
- Lockbox codes, alarm codes, gate codes, garage codes, and keys' locations
- Any information about minors (names, ages, schools, schedules)
- Anything covered by a nondisclosure or confidentiality agreement
- Medical, health, or disability information about anyone
- Immigration or citizenship status
- Passwords, logins, and security answers
- Full copies of signed contracts, IDs, or statements with the above still visible
- Any document you would not forward to a stranger

Fine to paste (after the above are stripped): verified property facts, your own notes, public record data, your voice file, a redacted document with placeholders, a client's first name and the question they asked.

The test: if it leaked, would it hurt the client, the deal, or your license? If yes, it does not go in.

See Chapter 4.5.