

ARTIFICIAL INTELLIGENCE (AI) USAGE NOTICE

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Campbell & Company (C&C) values the trust our clients and partners place in us. We use artificial intelligence ("AI") responsibly, with attention to privacy, security, fairness, and professional judgment. This notice explains the principles that guide our use of AI in client work and firm operations. It is organized into six sections:

- 1) Human Oversight and Accountability
- 2) Approved, Secure Tools
- 3) Protecting Confidential and Client Information
- 4) Transparency in Client Work and Meetings
- 5) Ethical and Lawful Use
- 6) Oversight and Questions

1. Human Oversight and Accountability

- We are responsible for our work. We review AI-assisted output before use, and AI supports our judgment, expertise, and creativity rather than replacing it.
- We are responsible for the accuracy, completeness, and quality of our deliverables and decisions, whether AI helped prepare them or not.

2. Approved, Secure Tools

- We use AI tools only after reviewing them for privacy and security. We use those tools within a secure, access-controlled environment.
- Content processed through approved licensed AI tools stays within our controlled environment. We do not use it to train public AI models, and we do not share it externally.

3. Protecting Confidential and Client Information

- We follow our client and partner agreements for data, tools, AI use, and third-party sharing.
- We protect confidential and proprietary information. We do not enter sensitive client data into AI tools that have not been approved.

4. Transparency in Client Work and Meetings

- We do not mislead clients about the tools we use to support their work.
- C&C does not allow fully autonomous AI communication with clients unless C&C leadership approves it in advance and the client receives clear disclosure.
- When we use AI-enabled meeting features, such as recordings or summaries, we notify participants and obtain consent, especially in meetings with external participants. AI-generated transcripts and summaries can contain errors, so we verify them before relying on them.

5. Ethical and Lawful Use

- We do not allow AI to be used for fraudulent, harassing, deceptive, or malicious purposes, including disinformation or deepfakes to be created.



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- We check AI-generated content against reliable sources to reduce the risk of bias, errors, and misinformation.
- We consider environmental impact when using AI and choose lower-technology options when they are the more responsible fit.
- Our AI use complies with applicable laws and regulations, including privacy and intellectual property laws.

6. Oversight and Questions

- Our IT Department and AI Advisory Council oversee our use of AI. We review this notice at least once a year and update it as technology, law, and firm practices change.
- Clients, potential clients, and partners may contact the AI Advisory Council at AI.Campbell@campbellcompany.com with questions or concerns about C&C's use of AI, or to request a copy of the full privacy policy.