

# Privacy Policy

ClearBridge AI, LLC. | Last Updated April 30, 2026

## 1. Introduction

This Privacy Policy explains how ClearBridge AI, LLC. ("ClearBridge AI," "we," "us," or "our") collects, uses, discloses, and protects information in connection with our websites, applications, AI-assisted workflows, communications tools, CRM-related services, automation services, and related products and services (collectively, the "Services").

This Policy applies to information we collect through [www.clearbridge-ai.com](http://www.clearbridge-ai.com), [app.clearbridge-ai.com](http://app.clearbridge-ai.com), related ClearBridge AI domains, and any other software, services, or communications we provide in connection with the Services.

By using the Services, you acknowledge that your information will be handled as described in this Policy. If you use the Services on behalf of a business or other organization, you represent that you are authorized to provide information to us and to direct our processing of that information.

## 2. Information We Collect

### Account, Contact, and Business Information

When you contact us, request information, book a call, create an account, or use the Services, we may collect information such as your name, company name, business address, email address, phone number, role, account credentials, and information about your business needs.

### Billing and Payment Information

If paid services are enabled, we may collect billing contact details and transaction-related information. Full payment card details are processed by our payment processor, such as Stripe or another provider, and are not stored on ClearBridge AI servers.

### Customer Data and User Content

You may upload, create, store, or process information through the Services, including business descriptions, logos, photos, knowledge base materials, custom emails, customer records, user email addresses, documents, workflows, settings, and other content you provide (collectively, "Customer Data").

### Communications, CRM, and Conversation Data

Depending on the Services you enable, we may process customer-related information such as contact records, notes, pipeline data, appointment details, tasks, tags, form submissions, lead capture data, calendar bookings, reminders, and related CRM records.

The Services may also process inbound and outbound SMS/MMS content, email content, call logs, caller ID and call metadata, voicemail content, call recordings or transcriptions where enabled, live chat or web chat transcripts, and other messaging records.

## AI Processing and Automation Data

Certain features may use artificial intelligence to generate responses, summarize conversations, route communications, analyze content, create suggested actions, or assist with workflow automation. To provide these features, we may process message content, prompts, responses, call transcripts, metadata, knowledge base content, business information, configuration settings, and instructions you provide to the AI.

AI functionality may be provided by third-party providers, such as large language model, speech-to-text, text-to-speech, or workflow automation providers. We take reasonable steps to use providers that are contractually obligated to protect information processed on our behalf. AI outputs may not always be accurate, complete, or appropriate, and you are responsible for reviewing and supervising AI use where required.

## Voice Services and Call Recording

If you enable voice AI, call recording, voicemail, or transcription features, the Services may process audio content, call recordings, voicemails, transcripts, and related metadata. By enabling these features, you are responsible for obtaining all necessary permissions and consents from relevant parties, including compliance with applicable call recording, wiretapping, telemarketing, and communications laws.

## Integrations and Third-Party Platform Data

With your authorization, the Services may connect to third-party platforms such as Google Business Profile, Google Calendar, online business listing sites, CRM systems, messaging platforms, analytics tools, advertising tools, or other integrations. Depending on the integration, we may read, create, update, or process information such as business name, address, phone number, hours, services, posts, reviews, calendar events, messages, and related account data.

We use integration access only to provide, maintain, and improve the Services, and we do not modify your connected listings or accounts unless authorized by you or configured through your account settings. Use and transfer of information received from Google APIs will adhere to applicable Google API Services User Data Policy requirements, including Limited Use requirements where applicable.

## Device, Diagnostic, Login, and Usage Information

We may collect diagnostic and technical information such as browser type, browser language, device type, operating system, hardware details, software version, IP address, crash reports, logs, referring pages, pages viewed, links clicked, and other information about how the Services are accessed and used.

We may use cookies, pixels, web beacons, local storage, and similar technologies to operate the Services, remember preferences, support login sessions, analyze usage, improve functionality, measure marketing performance, and help detect fraud or abuse.

## Location Information

We do not collect precise real-time geolocation information unless a feature requires it and you grant permission. We may infer general location from information such as IP address or business address to support security, analytics, service configuration, or compliance purposes.

## 3. How We Use Information

We use the information we collect to:

- Provide, operate, maintain, secure, and improve the Services.
- Create and manage accounts, onboarding, subscriptions, billing, support, and administrative communications.
- Configure websites, CRM tools, messaging, calling, calendars, automations, AI features, integrations, and related workflows.
- Send and receive messages, log calls, book appointments, manage pipelines, support customer follow-up, and provide reporting.
- Generate AI-assisted responses, summaries, routing, suggested actions, and other automation outputs.
- Analyze usage, troubleshoot errors, monitor service performance, and improve user experience.
- Communicate with you about service updates, support, onboarding, security, billing, and marketing where permitted.
- Protect the Services, our users, our business, and the public from fraud, abuse, unauthorized access, and unlawful activity.
- Comply with legal obligations, enforce our agreements, and respond to lawful requests.

We may use aggregated or de-identified information for analytics, service improvement, reporting, and business planning, provided it does not reasonably identify an individual or customer.

## 4. How We Share and Disclose Information

We do not sell, rent, or trade personal information for money. We may share information only as described below.

### Service Providers

We may share information with trusted service providers that help us provide, analyze, secure, and improve the Services. These may include providers for hosting, cloud storage, database management, web analytics, payment processing, SMS and telephony, email delivery, customer support, AI processing, speech processing, security, and other operational services. These providers may access information only as necessary to perform services for us and are expected to protect it under appropriate confidentiality and security obligations.

### Authorized Integrations and Customer-Directed Sharing

When you connect an integration, enable a workflow, invite users, send messages, publish content, respond to reviews, sync calendars, or otherwise direct the Services to interact with third parties, we share information as necessary to perform your instructions.

### Business Customers and End Users

If your account is provided by or associated with a business customer, that business customer may have access to information processed within its account, including user activity, customer communications, CRM records, and configuration settings.

## Legal, Safety, and Compliance

We may disclose information when we believe in good faith that disclosure is necessary to comply with applicable law, regulation, subpoena, court order, legal process, or governmental request; to enforce our agreements; to investigate or prevent fraud, security incidents, or illegal activity; or to protect the rights, property, and safety of ClearBridge AI, our users, customers, or others.

## Professional Advisors and Business Transfers

We may share information with attorneys, accountants, insurers, auditors, and other professional advisors. If ClearBridge AI is involved in a merger, acquisition, financing, reorganization, bankruptcy, sale of assets, or similar transaction, information may be transferred as part of that transaction, subject to applicable law and reasonable confidentiality protections.

## Aggregated or De-Identified Information

We may disclose aggregated, de-identified, or non-personal information that cannot reasonably be used to identify an individual or customer.

## 5. SMS, Email, and Phone Communications

By providing a phone number or email address, you consent to receive communications from ClearBridge AI, which may include service-related messages, account and billing notices, appointment reminders, support and onboarding messages, security notices, and marketing or promotional messages where permitted by law.

Message and data rates may apply. Message frequency may vary. You may opt out of marketing SMS messages by replying STOP to any message you receive from us. For help, reply HELP or contact support@clearbridge-ai.com. Even if you opt out of marketing messages, we may still send non-promotional messages related to your account, transactions, security, billing, or ongoing Services.

If you upload or provide contact information for your own customers, leads, or subscribers, you are responsible for obtaining all required consents and authorizations to contact those individuals, including through automated dialing systems, SMS/MMS, calls, email, and AI-assisted communications, in compliance with the TCPA, CAN-SPAM Act, state privacy and telemarketing laws, and other applicable rules.

We do not share mobile opt-in data, SMS consent records, or text messaging originator opt-in information with third parties for their own marketing or promotional purposes.

## 6. Cookies, Analytics, and Advertising Technologies

We and our service providers may use cookies, pixels, web beacons, local storage, and similar technologies to provide and operate the Services, remember preferences, maintain sessions, analyze traffic and usage, improve performance, measure marketing effectiveness, support security, and detect fraud.

We may use analytics or advertising tools, such as Google Analytics, Google Ads, or similar services, if enabled. Third-party vendors may use cookies or similar technologies to measure usage or serve ads based on prior visits to our website or other websites. You can usually configure your browser to refuse cookies or alert you when cookies are being sent, but some parts of the Services may not work properly without them.

Where required by law, we will provide appropriate cookie controls or opt-out mechanisms. You may also use available industry or browser-based opt-out tools for personalized advertising.

## 7. Data Retention

We retain information for as long as necessary to provide the Services, maintain business records, comply with legal obligations, resolve disputes, enforce agreements, protect security, and fulfill the purposes described in this Policy.

If you cancel your account or request deletion, we will take reasonable steps to delete or de-identify information as required by applicable law and our agreements. Some information may remain for a limited time in backups, logs, legal records, security records, or other systems where deletion is not immediately practical or legally required.

## 8. Security

We use reasonable administrative, technical, and organizational safeguards designed to protect information from unauthorized access, loss, misuse, alteration, and disclosure. No method of transmission or storage is completely secure, and we cannot guarantee absolute security.

You are responsible for maintaining the confidentiality of your account credentials, limiting access to authorized users, using strong passwords, enabling available security features, and promptly notifying us of any suspected unauthorized access.

## 9. International Data Transfers

ClearBridge AI is based in the United States. Information may be processed and stored in the United States or other countries where we or our service providers operate. These countries may have data protection laws that differ from those in your location. Where required, we use appropriate safeguards for international transfers.

## 10. Your Privacy Rights

Depending on your location and applicable law, you may have rights to access, correct, delete, restrict, object to certain processing of, or request portability of your personal information. You may also have the right to withdraw consent where processing is based on consent.

To exercise privacy rights, contact us at [support@clearbridge-ai.com](mailto:support@clearbridge-ai.com). We may need to verify your identity or authority before fulfilling a request. If we process personal information on behalf of a business customer, we may direct your request to that customer or act according to that customer's instructions.

### European Economic Area, United Kingdom, Switzerland, and Similar Jurisdictions

Where applicable, we process personal data under lawful bases such as performance of a contract, legitimate interests, consent, compliance with legal obligations, and protection of vital interests. When ClearBridge AI acts as a processor or service provider on behalf of a customer, we process personal data according to that customer's documented instructions and applicable data protection terms.

### California Privacy Rights

California residents may have rights under the California Consumer Privacy Act, as amended by the California Privacy Rights Act, including the rights to know, access, delete, correct, opt out of certain sales or sharing, limit certain uses of sensitive personal information, and not be discriminated against for exercising privacy rights.

We do not sell personal information for money. If our use of advertising or analytics cookies is considered a "sale" or "sharing" under California law, you may opt out by using available cookie controls where provided or by contacting us at [support@clearbridge-ai.com](mailto:support@clearbridge-ai.com).

## **11. Children's Privacy**

The Services are not directed to children under 13, and we do not knowingly collect personal information from children under 13. If we learn that we have collected personal information from a child under 13, we will take reasonable steps to delete it. If you believe a child has provided information to us, contact [support@clearbridge-ai.com](mailto:support@clearbridge-ai.com).

## **12. Changes to This Policy**

We may update this Privacy Policy from time to time. If we make material changes, we will provide notice by posting the updated Policy on our website, sending an email notice, or using another reasonable method. The "Last Updated" date above indicates when this Policy was most recently revised.

## **13. Contact Us**

If you have questions, complaints, or requests regarding this Privacy Policy or our privacy practices, contact us at:

ClearBridge AI, LLC.  
Attn: Privacy Officer  
1119 South Loomis Street, Suite 202  
Chicago, IL 60607  
United States  
Email: [support@clearbridge-ai.com](mailto:support@clearbridge-ai.com)