

SetupCare Privacy and AI Usage Policy

Version / Effective Date: July 5, 2026

This Policy describes how we handle information you share with us. It applies whenever you share information with us or use our services, and forms part of the SetupCare Terms of Service. We may update this Policy from time to time; the version in effect at the time applies. Certain binding commitments regarding your information, including your representations about information you share, confidentiality waivers, and breach notification, appear in the Terms of Service themselves (see Section 23).

Part A. Privacy

How we protect your information. Your trust means everything to us, and protecting your information is part of that trust. We maintain reasonable security procedures and practices appropriate to the nature of the information we hold, consistent with industry standards among similar professionals.

Marketing. We will not share your data for marketing purposes.

When we share information. We may share your contact information with a provider when making a referral, or to let a provider know that a referral has been made. We may also consult with other providers to ensure quality of service, to meet legal or ethical obligations, or for educational purposes that advance the standards of our industry. When we consult with others for those purposes, your information will be anonymized.

HIPAA. The Health Insurance Portability and Accountability Act (HIPAA) does not apply to SetupCare. We are not a covered entity under that law. While we treat your information with care, we are not bound by HIPAA's specific requirements.

Data breaches. As stated in our Terms of Service, if we become aware of a breach affecting your personal information, we will notify you in accordance with applicable California law.

Third-party platforms. In the course of serving you, we may offer collaborative use of other technological platforms or providers. Your use of these technologies is governed by their own terms and privacy policies, which you agree to review before using them. As of July 5, 2026, the privacy policies of some of the tools and platforms that may be used in providing services to you may include (but are not limited to):

- <https://useforyer.com/docs/privacy-policy.pdf>
- <https://koalendar.com/privacy>
- <https://www.zoom.com/en/trust/privacy/privacy-statement/>
- <https://stripe.com/privacy>

Part B. Artificial Intelligence

Artificial intelligence (AI) is becoming increasingly necessary and unavoidable in order to use certain essential software or services. It is therefore important to us that you know how we approach using artificial intelligence.

We may use artificial intelligence tools in the course of serving you. We believe that using artificial intelligence in relevant circumstances increases the value of our services, while potentially reducing the billable hours charged to you. For example, we may use an AI tool to review drafted correspondence for typos, grammatical errors, and clarity.

When we do use artificial intelligence, we take reasonable steps to protect your privacy, which may include reasonably altering or removing identifiable information before using it with any AI tool.

We are committed to using AI responsibly and within reason. We are also committed to providing you with services grounded in our applicable expertise.