



## Weatherill Wealth - Meeting Transcription Explained

### The Transcription Tool...

The meeting transcription tool is called WealthAssist Notetaker. It is an internal RBC-built artificial intelligence (AI) tool that securely transcribes the dialogue from meetings into text. Then using the transcribed notes, it creates an accurate and detailed summary. It captures key discussion points, decisions, and action items – allowing our team to focus entirely on listening to the great people we help rather than taking notes. This can be done for in-person or virtual meetings.

### How Does It Work?

#### Before the Meeting

- We will request consent to record the conversation
- We will open the application on our secure RBC issued device (laptop, tablet, or phone)

#### During the Meeting

- The tool transcribes the conversation in real-time on the advisor's laptop
- Recording can be paused at any time if participants prefer not to capture sensitive information

#### After the Meeting

- A summary with action items is generated within minutes
- We review it for accuracy
- Participants will receive a clear recap of discussions, decisions, and next steps

### Privacy & Security: Frequently Asked Questions

| Question:                                    | Answer:                                                                                                                                                                                                                 |
|----------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Why is the meeting being recorded?</b>    | The recording allows us to create a complete, accurate summary—including decisions, action items, and next steps. This saves time, reduces misinterpretation, and leads to increased engagement throughout the meeting. |
| <b>How is your information kept private?</b> | Your data stays within RBC with strict access controls in place. Only RBC's support team can access recordings if there is a technical issue. Your information never leaves RBC.                                        |
| <b>How long is the recording kept?</b>       | Recordings are retained for one day only. After that, the recording and transcript are permanently deleted.                                                                                                             |
| <b>Can anyone listen to the recording?</b>   | No. We do not have access to a voice recording. It is retained only to ensure the summary generates correctly, then it is deleted.                                                                                      |
| <b>How is your information used?</b>         | The recording is used only to create the meeting summary. Once the summary is complete, the recording and transcript are not used for any other purpose.                                                                |
| <b>What if you are not comfortable?</b>      | Clients can decline at any time without any impact. We will take notes by hand instead. There is no pressure whatsoever.                                                                                                |

### Questions or Concerns?

Please reach out to us at:

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