



## Meeting Transcription Explained

RBC's meeting transcription tool is an internal RBC-built artificial intelligence (AI) tool that securely and confidentially transcribes the dialogue from meetings into text – creating an accurate and detailed summary. It captures key discussion points, 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 in-person, or virtually.

### How Does It Work?

#### Before the Meeting

- We will ask for consent to record the conversation. You can always say no, if you are not comfortable.

#### During the Meeting

- If approved, the tool transcribes the conversation in real-time.
- Recording can be paused at any time if participants prefer not to capture sensitive information.

#### After the Meeting

- A summary, and action items are generated and we review it for accuracy.
- Participants are able to receive a 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>Can someone listen to the recording?</b>  | We do not have access to recordings. They are retained only to ensure the summary generates correctly, then deleted automatically.                                                                                      |
| <b>How long is the recording kept?</b>       | Recordings are retained for one day only. Transcriptions are retained for 7 days. After that, the recording and transcript are permanently deleted, but the summary is kept in your file with us.                       |
| <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>      | One 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:

**Phone:** 1-403-341-8868

**Email:** [weatherillwealth@rbc.com](mailto:weatherillwealth@rbc.com)