

Farsight provides AI agents and related tools that help business customers automate financial workflows and decision-making for investment banking, private equity, hedge fund, wealth management, and other financial services use cases. This Privacy Policy explains how Farsight collects, uses, discloses, and protects personal information in connection with our websites, platform, services, customer relationships, business development activities, and related support.

I. Personal Information We Collect

Depending on how you interact with Farsight, we may collect the following categories of personal information from you, our customers, authorized users, public and commercial sources, integrations, service providers, and other third parties.

Customer Content and Public or Commercial Source Data

Farsight's services process customer-selected, customer-provided, publicly available, and commercially available information to generate workflow automation, analysis, search results, dashboards, documents, and other outputs for our business customers. Depending on the source and the customer use case, this information may include personal information about business contacts, customer personnel, investors, executives, advisors, counterparties, prospective clients, and other individuals identified in customer systems, public records, government filings, websites, or other source materials.

When Farsight processes personal information in customer content on behalf of a customer, Farsight processes that information pursuant to its agreement with that customer and the customer's instructions; the customer remains responsible for its own notices, permissions, and lawful basis for providing that information to Farsight. We do not use customer content to build consumer marketing databases or to sell lists of consumers.

Farsight processes customer content and source data for legitimate business purposes, which may include the following:

- Providing an AI-powered financial workflow automation platform that helps our customers automate and customize work within their existing operating patterns.
- Automating deliverable workflows, including pitch decks, financial models, investment memoranda, CIM generation, DCF modeling, and other client-ready materials.
- Surfacing insights, identifying patterns, and generating proactive strategic work product suggestions.
- Operating, securing, maintaining, troubleshooting, and improving the platform, including by creating indexes, configurations, and other service-generated data needed to deliver the services.

When we process personal information for our legitimate interests, we consider and balance any potential impact on individuals and their rights under applicable data protection laws. We also seek to collect, use, retain, and disclose personal information only as reasonably necessary and proportionate for the disclosed purposes, or for other purposes that are compatible with the context in which the information was collected.

Information You Provide to Us

When a customer signs up for or uses our services, we may collect personal information about that customer's representatives, employees, contractors, and other authorized users, such as name, business contact information, job title, employer, account credentials, billing and payment administration information, support requests, communications, and information submitted through forms, contracts, or account settings. Customers and authorized users may also provide queries, uploads, annotations, comments, prompts, outputs, and other content that may be visible to other authorized users within the same customer organization or workspace.

Usage Information and Service Logs

When you interact with Farsight, we may automatically collect records of your use of the website and services, including queries, prompts, analyses, annotations, visualizations, outputs, log-in events, feature usage, and related activity. Information about your interaction with Farsight, including queries, visualizations, and analyses, is saved for twelve months on our servers unless you delete that information or delete your account. We do not manually inspect individual search queries except as necessary to provide, secure, support, troubleshoot, or improve the services, and we encrypt logs related to searches or inquiries. If you choose to share results, queries, analyses, or similar information with others, copies may remain viewable by those recipients even after you remove the information from your profile or delete your account.

Farsight is not a data broker. Farsight does not maintain files on individuals' purchases, sell lists of consumers, collect consumer information for targeted advertising, or provide consumer scoring. In addition, Farsight:

- Does not maintain transaction-specific data about consumer purchases.
- Does not obtain payment data from retailers and/or catalog companies.
- Does not track consumer product purchases, the dollar amount of the purchase, the date of the purchase, or payment types.
- Does not obtain information from magazine publishers about the types of subscriptions sold.

Put simply, Farsight does not provide consumer marketing databases, or the means to produce consumer marketing databases, in any shape or form.

Cookies and Similar Technologies

When you visit the Farsight website or use our services, we may use cookies, pixels, local storage, and similar technologies to recognize your browser or device, maintain your session, secure the services, remember preferences, understand how the services are used, and improve performance. These technologies may collect identifiers, device and browser information, usage information, approximate location derived from IP address, and related internet or network activity information.

Cookies allow Farsight to provide customers and website visitors with a better and more secure experience. While the exact names and parameters of cookies used by Farsight may change periodically, they are generally used for authentication, security, preferences, performance, analytics, and service improvement. You can control cookies through your browser settings and, where available, through any cookie preference tool we provide, but disabling certain cookies may affect website or service functionality.

Device, Log, and Security Information

When you access any Farsight website, network, server, API, or other electronic asset, our systems may automatically record information that your browser, device, or integration sends to us. These logs may include the nature and content of your request, IP address and approximate location, browser or device type and version, browser language, referring or exit pages, date and time of your request, identifiers, and cookies or similar technologies. We may use and preserve this information as reasonably necessary to operate and secure our systems, investigate actual or attempted unauthorized access, enforce our Terms of Service or other contractual obligations, and address fraud, security, or technical issues.

Your Communications With Us

When you send or receive email or other communications with us, we may retain those communications to process inquiries, respond to requests, provide support, manage the customer relationship, improve our services, and inform you about changes in our policies, pricing, service offerings, or other business matters. We may also use email delivery, analytics, or similar tools to understand whether business communications were delivered, opened, or acted upon for quality control, support, and response purposes. If you subscribe to alerts or similar communications, you can manage the nature, scope, and frequency of those communications through your account settings or the applicable unsubscribe or preference mechanism.

Third-Party Links and Services

Our websites and services may include links to third-party websites, services, or integrations. Farsight is not responsible for the privacy practices of third parties, and their collection, use, and disclosure of personal information are governed by their own privacy notices and terms.

Children

Farsight's services are intended for business users and are not directed to children under 13. We do not knowingly collect or maintain personal information from children under 13. If we learn that personal information from a child under 13 has been collected without verifiable parental consent, we will take appropriate steps to delete it. To request deletion of any such information, please contact us at privacy@farsight-ai.com.

II. How We Use and Disclose Information

How We Disclose Information

We may disclose personal information as described below, as directed or authorized by our customers or users, or as otherwise permitted or required by law.

Customers and Authorized Users: We may disclose personal information and customer content to the customer organization that controls the relevant account or workspace and to other authorized users, administrators, or recipients selected by the customer or user.

Service Providers and Business Partners: We may disclose personal information to vendors, contractors, hosting providers, data providers, analytics providers, security providers, payment processors, customer-support providers, professional advisers, integration partners, and other third parties that help us provide, secure, support, analyze, or improve the services. We require these parties to process personal information for authorized business purposes and subject to appropriate contractual obligations.

Legal, Compliance, Security, and Protection Purposes: We may use, disclose, preserve, or log personal information if we have a good-faith belief that doing so is reasonably necessary to satisfy applicable law, regulation, legal process, subpoena, court order, governmental request, or compliance review; enforce applicable terms or contractual obligations; resolve disputes or inquiries; detect, prevent, or address fraud, unauthorized transactions, security, or technical issues; protect against legal claims or liability; or protect the rights, property, safety, or security of Farsight, our users, our customers, or the public.

Business Transactions

If Farsight becomes involved in a merger, acquisition, financing, reorganization, bankruptcy, receivership, sale of company assets, or similar business transaction, personal information may be disclosed to or transferred as part of that transaction. We will take reasonable steps to protect the confidentiality of personal information involved in such transactions and provide notice where required by applicable law.

Aggregated, De-Identified, and Anonymized Information

We may use and disclose aggregated, de-identified, or anonymized information to operate, analyze, improve, and describe our services, including to understand usage trends and improve the quality of results. We do not use aggregated or de-identified information to identify you, and we do not disclose individual search results, customer content, or identified information about your searches or outputs except as described in this Privacy Policy, directed by the customer or user, or permitted by law. We do not use account numbers, access credentials, or similar access codes for marketing purposes.

How We Protect Your Information

We maintain commercially reasonable administrative, technical, physical, and procedural safeguards designed to protect personal information against unauthorized access, alteration, disclosure, or destruction. These safeguards may include internal reviews of data collection, storage, and processing practices; access controls; confidentiality obligations; security measures for systems that store personal information; and restrictions on access to personal information to employees, contractors, agents, and service providers who need the information to operate, develop, secure, support, or improve our services. No method of transmission or storage is completely secure, but we work to protect personal information in a manner appropriate to the nature of the information and our services.

Data Retention, Integrity, and Quality

Farsight processes personal information for the purposes described in this Privacy Policy and retains it for as long as reasonably necessary to provide the services, maintain customer accounts, comply with legal and contractual obligations, resolve disputes, protect the services, and pursue legitimate business purposes. For example, certain service interaction information is retained for twelve months as described above unless you delete the information or delete your account, while other records may be retained for longer where required or appropriate. We take reasonable steps to keep personal information accurate, complete, and current, but we depend on customers and users to update or correct their personal information when necessary.

Public and Third-Party Source Information

Information that Farsight delivers to customers from public, customer-provided, or third-party sources may be only as accurate, complete, and current as the underlying source material. Farsight generally cannot remove information from a public website, filing, database, posting, or other source that Farsight does not control. Before relying on information provided through the services, customers and users should take reasonable steps to validate the accuracy, completeness, and relevance of that information for their intended use.

Your Privacy Choices and Rights

Depending on where you are located and subject to applicable exceptions, you may have the right to request access to, correction of, deletion of, portability of, or additional information about personal information we maintain about you. You may also have the right to opt out of certain processing activities, such as sales, sharing, targeted advertising, or certain profiling, and to limit the use or disclosure of sensitive personal information where applicable. To exercise privacy rights, please contact privacy@farsight-ai.com and provide information sufficient for us to verify and process your request. We may decline or limit requests where permitted by law, including where a request is unreasonably repetitive, jeopardizes the privacy of others, would be extremely impractical, concerns information we process only on behalf of a customer, or is not otherwise required by applicable law.

If we process personal information on behalf of a customer, we may refer your request to that customer or ask that you contact the customer directly. Authorized agents may submit requests where permitted by applicable law, but we may require proof of authorization and verification of the individual's identity before processing the request.

For California residents and other individuals covered by similar U.S. state privacy laws, this Privacy Policy is intended to provide notice of the categories of personal information we collect, the categories of sources, the purposes for collection and disclosure, the categories of third parties to whom information is disclosed, and the rights that may be available under applicable law. Farsight does not sell personal information or share personal information for cross-context behavioral advertising as those terms are commonly used in U.S. state privacy laws, and Farsight does not offer financial incentives in exchange for personal information.

Contact Us and Complaints

Farsight regularly reviews its compliance with this Privacy Policy. You may direct questions, requests, or complaints regarding this Privacy Policy or Farsight's treatment of personal information to privacy@farsight-ai.com. When we receive a formal written complaint, it is Farsight's policy to contact the complaining user or other appropriate contact regarding the concern, and we will cooperate with appropriate regulatory authorities where required to resolve complaints that cannot be resolved directly.

International Data Transfers and the EU-U.S. Data Privacy Framework

Farsight is based in the United States, and personal information may be processed in the United States and other jurisdictions where we, our affiliates, service providers, or customers operate. Where required for transfers of personal information from the European Economic Area, the United Kingdom, or Switzerland, we rely on appropriate transfer safeguards, which may include Standard Contractual Clauses, adequacy decisions, or participation in the EU-U.S. Data Privacy Framework, the UK Extension to the EU-U.S. Data Privacy Framework, or the Swiss-U.S. Data Privacy Framework, as applicable.

The EU-U.S. Data Privacy Framework is the current framework for relevant transfers from the European Union to participating U.S. organizations. To learn more about the Data Privacy Framework program and to view participating organizations, please visit <https://www.dataprivacyframework.gov/>.

If Farsight self-certifies to the Data Privacy Framework, Farsight will process personal information received under the applicable framework in accordance with the Data Privacy Framework Principles and will identify the scope of its certification on the Data Privacy Framework list. Individuals with inquiries or complaints regarding Farsight's handling of personal information under the Data Privacy Framework should first contact privacy@farsight-ai.com.

Where Farsight participates in the Data Privacy Framework, unresolved complaints may be referred to the independent dispute-resolution provider identified in Farsight's Data Privacy Framework certification, and those services will be provided at no cost to the individual where required by the Data Privacy Framework Principles.

Where applicable, individuals may also have the possibility, under certain conditions, to invoke binding arbitration for residual complaints regarding Data Privacy Framework compliance not resolved by other Data Privacy Framework mechanisms.

In the context of an onward transfer, and where Farsight participates in the Data Privacy Framework, Farsight may be responsible for personal information it receives under the applicable framework and transfers to a third party acting as an agent on its behalf if that agent processes the information in a manner inconsistent with the applicable Data Privacy Framework Principles.

Individuals in the European Economic Area, the United Kingdom, Switzerland, and other jurisdictions may have additional rights regarding their personal information, subject to applicable limitations and exceptions.

These rights may include the right to request access to, correction of, deletion of, restriction of, objection to processing of, or portability of personal information that pertains to you.

Where processing is based on consent, you may have the right to withdraw consent at any time, without affecting processing that occurred before withdrawal.

You may also have the right to lodge a complaint with a supervisory authority or other regulator in your jurisdiction.

To exercise any privacy right, contact privacy@farsight-ai.com. Under the EU-U.S. Data Privacy Framework, the Federal Trade Commission has jurisdiction over participating organizations' compliance with the Framework.

III. Changes to this Privacy Policy

This Privacy Policy may change from time to time. We will post changes on this page and update the effective date, and, if we believe changes are material, we will provide more prominent notice where required or appropriate, such as through the services or by email. If applicable law requires consent for a material change, we will seek that consent. If you have any questions or concerns about this Privacy Policy, please contact us at privacy@farsight-ai.com.