



Technical framework — where your client portfolios live

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Local inference, ring-fencing client by client · fictional document

Fictional document — demonstration example

This document is produced by the Blue Lemon Agent website to illustrate what an AI agent hands to its users. The companies, matters, amounts and people in it are invented. It has no legal, accounting or commercial value.

Fictional document, produced for the demonstration. **It describes the architecture actually proposed**: a client's wealth data is among the most sensitive a firm holds, and its confidentiality is part of what the firm sells.

The two deployment modes, at the firm's choice

Mode	Where computation happens	What leaves the network	For whom
Local inference	On a machine belonging to the firm	Nothing	Firms that already host their own server
Isolated resource	On a dedicated server hosted in France	Nothing outside the European Union	Firms that would rather not administer a machine

In both cases the resource is dedicated to your firm. No pooling with another practice: your portfolios, your templates and your client files live in an environment that is

yours alone.

What protects your clients' financial data

Point	Implementation	What it lets you tell a client
Training	No portfolio feeds any model	« What we know about you serves only you »
Technical account permissions	Read-only — the agent posts drafts, the adviser signs	« This can be checked with a single command »
Ring-fencing	Client by client, access defined for each, every consultation logged	« Only your adviser opens your file »
Role-based access	Rights follow the job: the middle office composes, it does not sign	« The signature remains your adviser's »
Logging	Which file opened, by whom, at what time, which document produced	« We can retrace every document produced »
Hosting	France, under French law, architecture designed to reduce exposure to extraterritorial legislation, location alone not being enough to guarantee immunity	« Your data is processed within the European Union in the architecture chosen »

What the agent plugs into — with no migration

Tool already in place	What the agent does there	What changes for the team
Practice management software	Reads holdings and transactions	Nothing: same software, same screens
Feeds of the 6 partners	Reconciles transactions, chases what is missing	No agreement to renegotiate

Tool already in place	What the agent does there	What changes for the team
In-house report template	Applies it as it stands	The template stays maintained by compliance
Document base	Posts documents as drafts	The signature stays with the adviser

What it is worth commercially

Fact	Value
Meetings where the hosting question was raised	9 of the last 12 meetings above €2m
Written, dated answer	One page, kept up to date
Data transfers outside the European Union	0
Investment recommendations produced by the agent	0

Reversibility, verifiable before committing

Element	On exit
File index	Deleted — it held no portfolio, only what is needed to find your data
Tools in place	No migration on the way in, therefore none on the way out
Enriched template, front page, method note, compliance file, punctuality report	Stay with the firm, readable without us
Dry-run exit	Half a day at the first quarter, protocol written

For the firm to set

Deployment mode chosen (local inference / isolated resource): _____

Scope of this document: the service operated by Blue Lemon Agent. For an agent deployed at your premises, the applicable location is that of the architecture set out in the quotation and verified before commissioning; local execution is announced only for the configuration explicitly described and accepted in the quotation; the applicable isolation depends on the deployment mode set out in the quotation, no dedicated isolation being presumed; the encryption mechanisms in transit and at rest, their components and key management are those documented for the architecture chosen; roles and permissions are configured and accepted for the identities and systems actually connected; the events logged, their content, their retention period and who may access them are defined for the deployment chosen.