Technical framework — where your client portfolios live

LINDBERGH FORMATION — 16 rue de Maillé, 91310 Montlhéry, France · Companies register (RCS) Evry 817 946 114

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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**

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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**

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For the firm to set

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

> **Request a demo with your own documents**
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> This document is a fictitious example. To see the agent work on your own documents, request a demo from its page.
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> https://bluelemonagent.ai/en/entreprises/cas-usage/agent-de-gestion-de-patrimoine-reporting

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.

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