

Morning Desk **Security Summary**

How client data is protected. Client information stays in Australia, is visible only to the adviser's firm, and nothing reaches a client without the adviser's sign-off.

Updated 29 October 2026

For compliance teams



Built on Google Cloud

Hosted in Australia. The AI that reads client data runs here too.



Encrypted

In transit and at rest, on every page and record.



Adviser signs off

The desk drafts. Nothing reaches a client until the adviser sends it.



Only the firm sees it



Never used to train AI



Export or delete any time

WHERE CLIENT DATA GOES



Adviser and team

Google, Microsoft or one-time email link. No passwords stored.



Morning Desk on Google Cloud

Books, notes, call notes, drafts

Australia **Encrypted**
Daily backups



Only the firm

Members see only the desks they are given.



Live voice and in-depth research may run outside Australia. They receive a label such as **Client 1** and holdings only, never names or notes.

THE DETAIL



Who can see it

- ✓ The firm's signed-in people only, each to their own desks.
- ✓ No passwords stored; the firm's two-step sign-in applies.
- ✓ Vertical AI staff never browse client data.



How it's protected

- ✓ HTTPS only, encrypted at rest; keys in Secret Manager.
- ✓ Rate limits and cross-site protection.
- ✓ Daily backups, kept 14 weeks.



What the AI does

- ✓ Drafts and summarises, with sources.
- ✓ Checks figures; audit trail of every sign-off.
- ✗ Never sends to a client. No buy, sell or hold advice.



The firm's control

- ✓ Initials until compliance approves real names.
- ✓ Export or delete all data any time; deleted on request when a firm leaves.

SERVICE PROVIDERS

PROVIDER	ROLE	CLIENT DATA
 Google Cloud	Hosting, data, AI, voice	Yes. In Australia; offshore features get labels only
 Firebase Authentication	Adviser sign-in	No. Adviser email only
 Stripe	Billing	No. Card details stay with Stripe
 Resend	Sign-in emails	No. Adviser email only

BUILT ON GOOGLE CLOUD

ISO/IEC 27001
Certification

SOC 2
Reports

IRAP
Assessed

These are Google Cloud's and cover its infrastructure. Morning Desk is built on it; they are not certifications of Morning Desk itself.