
Use of Artificial Intelligence (AI)

DTB Wealth makes use of Artificial Intelligence where it can improve the efficiency and quality of the services we provide to our clients.

AI may be used within our business to assist with activities such as research, analysis, administration, document preparation and client communications. AI is used as a support tool and does not replace the professional judgement, advice or responsibility of our financial planners and advisers.

Where AI is used to assist in the financial planning or advice process, the relevant financial planner or adviser remains responsible for the advice provided to you. Any AI-generated information or outputs used within our advice process is subject to appropriate human review. We recognise that AI systems may produce inaccurate, incomplete or biased information and therefore do not rely on AI outputs without appropriate professional oversight.

We place a high value on the confidentiality and protection of our clients' personal information. Our use of AI is subject to our information-security, privacy and data-protection requirements, including the requirements of the Protection of Personal Information Act (POPIA). At this stage client information is not knowingly submitted to any AI tools we make use of.

As part of our governance framework, we have implemented an internal AI Policy and Framework governing the use of AI within our business. This provides guidance to our staff on which AI tools and services are approved for business use, the purposes for which they may be used, the appropriate handling and protection of client information, and the level of human oversight and verification required when using AI-generated outputs. Our staff are required to use AI in accordance with this framework and our broader information-security and data-protection requirements.

We continuously assess our use of AI, the associated risks and benefits, and the safeguards required to ensure that technology is used responsibly and in the interests of our clients.