morningdesk by Vertical AI

COMMERCIAL IN CONFIDENCE

Morning Desk Security Summary

Client records and AI drafting stay in Google Cloud's Sydney region, only the adviser's firm can see them, and nothing reaches a client without the adviser's sign-off. Checked every day, not just promised.

Updated 12 November 2026 | For compliance teams

Built on Google Cloud
Client records and AI drafting in Sydney, with no fallback offshore.

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.

WHERE CLIENT DATA GOES

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

→

Morning Desk on Google Cloud, Sydney
Books, notes, call notes, drafts, audit trail
Australia | Encrypted | Backed up daily

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Only the firm
Members see only the desks they are given.

Live voice, read-aloud and deep research can run outside Australia. Stored client names go as a label such as **Client 1**, with holdings and no notes, on every desk. What is said aloud is sent as spoken. **Strict Australian residency**, one switch in the Trust centre, turns all three off, enforced on the server.

BUILT ON GOOGLE CLOUD

Client records sit in Google Cloud's Sydney region, on infrastructure the Australian Government has assessed.

Google Cloud's Australian regions meet the Australian Government's IRAP assessment and its Hosting Certification Framework. The same infrastructure is independently audited worldwide.

IRAP
Assessed for the Australian Government

ISO/IEC 27001
Information security management

SOC 2
Independent controls reports

Google secures
- Data centres, hardware and the network
- Encryption of everything stored
- The certified infrastructure above

Vertical AI secures
- Sign-in through the firm's Google or Microsoft account
- Each firm's desk walled off from every other firm
- Client records and AI drafting kept in Sydney
- An audit trail of every draft, sign-off and staff access

The certifications are Google Cloud's and cover its infrastructure, not Morning Desk itself. Compliance teams can request Google's IRAP and SOC reports through Google's Compliance Reports Manager.

CHECKED EVERY DAY, NOT JUST PROMISED

- **Trust centre** in the desk: a live map of where data is, from the running system's own settings. Plain rules, no AI.
- **Daily check at 7:05am** emails Vertical AI if anything fails or changes.
- **New-device sign-ins** trigger an alert.
- **Staff access** to a desk is written to that desk's own audit trail.
- **Compliance pack**: the map, the checks and the staff-access log, as one PDF.

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.
- ✓ Firm desks are closed to Vertical AI staff. On early pilot desks, support access is possible and every open is logged.

How it's protected
- ✓ HTTPS only, encrypted at rest; keys in Secret Manager.
- ✓ Signed sessions that expire; rate limits and cross-site protection.
- ✓ Daily backups, kept 14 weeks.

What the AI does
- ✓ Drafts and summarises, with sources.
- ✓ The same safety rule on every AI call; checks figures.
- ✗ Never sends to a client. No buy, sell or hold advice.

The firm's control
- ✓ Initials until compliance approves real names.
- ✓ Export any time. Delete from Account, with a 72-hour grace period.
- ✓ Never used to train AI, by Google or by us.

WHO WE USE

Google Cloud	**Firebase Auth**	**Stripe**	**Resend**
Hosting, database, AI, voice	Adviser sign-in (Google)	Billing	Sign-in, alert and usage emails
Client data, in Australia	**Adviser email only**	**No client data**	**Adviser email only**

QUICK ANSWERS

Used to train AI?	No. Not by Google, not by us.
Where is it stored?	Google Cloud in Sydney. Only voice, read-aloud and deep research can run elsewhere, and strict residency switches them off.
What if the firm leaves?	Export everything, then delete it from Account. Deletion runs after 72 hours.

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