Protect Your Clients: AI Without the Risk

Idaho REALTORS® AI Education Series · Video 1 Companion Handbook

The one habit that protects your client, your license, and your brokerage:

Pause before you paste.

THE NEVER LIST

Never goes into any AI tool — free or paid

- ✕ **Client names & contact info** — Any personally identifiable information about a client or consumer.
- ✕ **Financial information**
  Pre-approval letters, proof of funds, settlement statements — any numbers tied to a person.
- ✕ **Transaction documents**
  Contracts, disclosures, inspection reports, closing docs. Even “just to summarize.”
- ✕ **MLS data**
  Listing data carries its own licensing rules — pasting it into outside tools can violate MLS policy.
- ✕ **Property details in a confidential context**
  An address or legal description tied to a client's private situation.
- ✕ **A client's personal circumstances**
  The divorce, the estate, the health situation behind the move. Their story stays theirs.
- ✕ **Brokerage internal information** — Strategies, proprietary lead data, vendor agreements, HR matters.

The test: would you be comfortable if this exact text appeared in front of a stranger? If not, it stays out.

THE GREEN ZONE

Safe today — generic in, your judgment out

- ✓ Brainstorming marketing ideas and content angles
- ✓ Drafting generic listing language — no client data, and you review every word
- ✓ Researching publicly available market trends
- ✓ First drafts of newsletters, social posts, and blog content
- ✓ Learning — asking AI to explain a concept in plain English

The rule: AI writes the first draft. You are always the final draft.

Educational resource only — not legal advice. Follow your brokerage's AI policy and consult your managing broker with questions.

Idaho REALTORS® · AI & Gray Data Subcommittee

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Lock Down Your Settings — Ten-Minute Checklist

On personal and free accounts, the major AI tools use your conversations for model training unless you turn it off. Business and enterprise plans generally don't train on your data by default — worth a conversation with your broker. Check the boxes as you go.

ChatGPT (OpenAI)

- ☐ Profile icon → Settings → Data Controls
- ☐ Turn OFF "Improve the model for everyone"

Tip: use Temporary Chat for one-off questions — it isn't saved to history

Claude (Anthropic)

- ☐ Profile → Settings → Privacy
- ☐ Turn OFF the model-training setting ("Help improve Claude")

Tip: Incognito chats aren't used for training regardless of this setting

Google Gemini

- ☐ Settings & help → Activity (or myactivity.google.com/product/gemini)
- ☐ Click the setting near the top → Turn off (or Turn off and delete activity)

Note: Google's own guidance says don't enter confidential info into Gemini — the Never List still applies

Microsoft Copilot

- ☐ Profile → Privacy settings
- ☐ Turn OFF "Model training on text" and "Model training on voice"

Also: review & clear past activity at account.microsoft.com/privacy

Three things to remember

- Settings are seatbelts, not permission to crash — the Never List applies even with training turned off.
- These menus change. Re-check your settings every few months; policies and paths move.
- You are responsible for every word you publish, no matter who — or what — drafted it.

Questions? Talk to your managing broker, or contact the Idaho REALTORS® office at 208-342-3585.

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