

Privacy Policy

StatementPilot • Valiz Labs LLC • Last updated: July 3, 2026

StatementPilot is a software service operated by Valiz Labs LLC. We let you upload bank statements and convert them into structured files such as CSV, Excel, and other formats (with more on the way). This Privacy Policy explains what information we collect, how we use it, and the choices you have, and should be read together with our Terms of Service. If you have any questions, email us at support@statementpilot.app.

The short version

We built StatementPilot to touch your financial data as little as possible. We do not store the statements you upload in the ordinary course, we do not review their contents except as described below, and we never sell your information or share it for advertising. To convert a statement, we pass the document to trusted AI providers (Google, through its paid Vertex AI enterprise platform, and, on escalation to a stronger model, Anthropic) only to read the numbers, then assemble the result within our own system. Neither provider uses your documents to train its models. That's it.

Information We Collect

We collect only what we need to run the service:

- **Account details:** your name and email address. These are managed through Clerk, our authentication and account provider, when you sign up or sign in.
- **The files you upload:** to perform a conversion, your statement is processed in memory and sent to our AI extraction providers. We do not save your uploaded files in the ordinary course, and we do not routinely read or review their contents (see "Your Files" below).
- **Usage information:** counts such as how many pages and documents you convert and download. We use these to enforce your plan's limits and to keep the service running reliably. We do not need or keep the contents of your statements to do this.
- **Payment details:** handled by our payment provider, Stripe (engaged through Clerk), at checkout. We do not store your full card or bank account numbers. For subscriptions, Stripe securely stores a tokenized reference to your payment method so we can process recurring charges.
- **Support and feedback messages:** if you contact us or use the in-app feedback form, we receive the name, email address, and message you choose to send, delivered through our email provider (Fastmail). Please do not include statement contents in these messages.

- **Technical and diagnostic data:** for example your IP address, device/browser information, and error reports, used to keep the service secure, prevent abuse (via Cloudflare Turnstile, provided through Clerk), and detect and fix problems (via our error-monitoring provider, Sentry). We configure our error monitoring to exclude the contents of your statements.

How We Use Your Information

We use your information to provide the service, convert your files, manage your account, enforce your plan limits, process payments, respond to support requests, and keep the service secure. We also use it to meet our legal obligations. We do not use your information for advertising, and we do not sell it.

We recognize that bank statements contain sensitive financial information. We minimize our handling of this data: it is processed in memory, is not written to long-term storage in the ordinary course, is used solely to perform the conversion you ask for, and is not used for any secondary purpose.

Your Files

We use the files you upload only to perform the conversion you ask for. Your uploaded statement is processed in temporary memory and kept only to complete the conversion and allow retries with stronger models: the file expires 15 minutes after the last conversion attempt, and is not written to long-term storage on our servers. So you can preview and export your results, the converted output is kept temporarily and then deleted automatically within 24 hours. Scanned statements are extracted by the same AI providers described below; the separate text-recognition (OCR) step that maps each extracted row back to its place in your original document, powering the side-by-side trace view, runs entirely on our own servers.

We do not review the contents of your statements in the ordinary course. We may access a file or its converted output only as strictly necessary to fix a technical problem you report, to investigate abuse or a security issue, or where required by law. We do not sell your files or use them for advertising. You are responsible for saving and securing the converted files you download.

We Do Not Sell Your Data

We do not sell your personal information, and we do not share it with third parties for advertising or for their own independent purposes. To convert a statement, we do disclose the document to our AI extraction providers: Google, through its paid Vertex AI platform (Gemini models), and, in some cases on escalation to a stronger model, Anthropic (Claude). They act as our service providers and use your document solely to extract the figures and return the result to us. Under both providers' enterprise terms, your statements are used only to return the extraction to us and are not used to train their models or for advertising. Anthropic processes in the United States. Google serves our requests through Vertex AI's global endpoint, which may route them to Google Cloud data centers inside or outside the United States. We select these providers for their no-training commitments, but we do not

control them and are not responsible for their practices. We may also disclose information when the law requires it or to protect our rights and our users.

Service Providers

Apart from the AI providers above, we rely on a small set of service providers to operate the service, and share data with them only as needed and under contract. They are: Clerk (authentication and accounts), Stripe (payments, via Clerk), Fly.io (hosting), Upstash (temporary caching and rate limiting), Cloudflare (abuse prevention, via Clerk), Sentry (error monitoring), and Fastmail (support and feedback email). Except for the AI processing described above, each processes data in the United States. A current list with details is on our Sub-processors page.

Data Retention

Uploaded statements are kept only to complete the conversion and power retries, and expire 15 minutes after the last conversion attempt; converted results are deleted automatically within 24 hours. We keep your account and usage information for as long as your account is active. If you delete your account from your account page, our systems immediately purge your usage records and any in-flight uploads or results; your authentication profile is deleted by Clerk; and we retain only the limited billing or transaction records we must keep for tax, accounting, or legal obligations. Any unused plan allowance is forfeited when you delete your account (see our Terms of Service). Diagnostic error logs are kept on a short, rolling basis. You can also ask us to delete your account information by emailing support@statementpilot.app, and we will complete it within a reasonable period (typically within 90 days).

Security

We take reasonable steps to protect your information. Data is encrypted in transit (HTTPS/TLS) whenever it moves between you, us, and our providers. Because we do not store your uploaded statements and delete converted results automatically, there is no long-term copy of your financial documents sitting on our servers in the ordinary course, which is one of the strongest protections we can offer. No online service can be completely secure, so we cannot guarantee absolute security. If we become aware of a security breach affecting your personal information, we will notify affected users and any regulators as required by applicable law, without undue delay.

Cookies

We use a minimal set of cookies, mainly to keep you signed in and to protect against abuse. We do not use advertising cookies, and we do not sell or share information collected through cookies.

Your Privacy Rights

Depending on where you live, you may have rights over your personal information, including the right to access it, correct it, delete it, obtain a copy of it, and ask how we use it. We do not sell or share your personal information, and we will not discriminate against you for exercising any of these rights. You can delete your account and its data yourself, at any time, directly from your account page. For any other request, email us at support@statementpilot.app. We will verify your identity (typically by confirming control of your account email) and respond within the timeframes required by applicable law (generally within 45 days, with one extension where permitted). If we decline a request, you may appeal by replying to our response.

Children's Privacy

StatementPilot is intended for adults, and you must be at least 18 years old to use it. We do not knowingly collect personal information from anyone under 18. If we learn that we have, we will delete it.

International Users

StatementPilot is intended for users in the United States. Your account, usage, and billing information is processed in the United States; AI extraction requests may be processed in Google Cloud data centers inside or outside the United States, as described above. We do not target or offer the service to residents of the European Economic Area or the United Kingdom. If you access the service from outside the United States, you do so on your own initiative and are responsible for compliance with local laws.

Changes

We may update this Privacy Policy from time to time. If we make material changes, we will update the date above and, where appropriate, provide additional notice (for example, by email or an in-product notice). This Privacy Policy is governed by the laws of the State of California.

Contact

Valiz Labs LLC

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