How Bizlift Legal Chat handles client information

A one-page summary for law firms, to help you meet the expectations in ABA Formal Opinion 512 (July 2024) that lawyers understand how the AI tools they use treat client information.

WHAT THE CHAT DOES, AND DOESN'T DO

Answers from your own website
It answers visitors' general questions using the pages already on your site, and links to the page each answer came from.

No legal advice
When a question depends on someone's own situation, it says so and offers a consultation instead of guessing.

No attorney-client relationship
Every visitor sees a notice saying so, and must agree to it, before the first message.

Intake goes to your form
Contact details a visitor chooses to give are submitted to your own consultation form, like any other web inquiry.

WHAT HAPPENS TO WHAT VISITORS TYPE

Personal details masked first	Phone numbers, email addresses, Social Security numbers, dates of birth and card numbers are replaced with placeholders on your server before anything is sent to an AI service. Names are not masked.
AI services used	Answers come from Anthropic's Claude; OpenAI is used for site search and as a backup. Both are used under business (API) terms.
Never used for training	Neither provider's business terms allow your visitors' messages to be used to train their models.
Provider retention	The providers keep API requests for up to 30 days to check for misuse, then delete them; longer only if a message is flagged for misuse or the law requires it.
Nothing kept in between	Bizlift's licensing service passes messages through without storing or logging their content. It records usage counts for billing.
On your website	Conversation text is erased after a period of inactivity your firm chooses (24 hours by default, up to 30 days). Until then you can review, export or delete any conversation; afterwards only anonymous statistics remain. Intake forms a visitor submits become ordinary form entries, kept under your own form settings.

HOW THIS MAPS TO THE OPINION

Competence (Rule 1.1)	This page, the visitor notice and your settings document how the tool works and where information goes.
Confidentiality (Rule 1.6)	Masking before the AI call, no training, short provider retention, no content stored by Bizlift, and site retention you control.
Communication (Rule 1.4)	Visitors are told, before chatting, that it's AI, that it isn't legal advice, and how long the site keeps the conversation.
Supervision (Rule 5.3)	You choose the content it answers from, the disclaimer, the retention period and where inquiries go, and you can review conversations.

This summary describes how the product works; it is not legal advice. Check your own jurisdiction's rules and opinions on AI and attorney advertising. Provider terms: Anthropic, privacy.claude.com; OpenAI, developers.openai.com/api/docs/guides/your-data. Checked October 2026.