

Privacy policy

Tradeval Workbench | Dover Industries LLC

Effective October 9, 2026

Operator and scope

Dover Industries LLC, a Massachusetts limited liability company, operates Tradeval Workbench at trade-validation.com. Contact bmbtgroup@gmail.com about privacy, access, correction, deletion, or complaints. This notice covers our website, user accounts, portfolio tools, and connected research APIs, not independent brokers, exchanges, or social platforms.

Information you provide

We process registration email addresses, optional display names, account identifiers, password hashes, and account settings. Research requests include tickers, searches, trade terms, strategies, quantities, and optional financial assumptions. Saved investment records can include account nicknames, institutions, account types, optional last four digits, balances, holdings, and position details. Do not submit full account numbers, brokerage passwords, or other unnecessary sensitive information. Portfolio records are research inputs, not linked brokerage custody accounts. If you import a positions file, such as a Fidelity CSV download, its contents are read to show you a preview; only the positions you choose to apply are saved, and the file itself is not kept.

Authentication and acceptance

Passwords are stored as Argon2id hashes, not plaintext. Google sign-in returns identifiers, an email address, verification status, and potentially a display name; we do not receive your Google password. Passkeys store public credential information; the private key stays with your device or passkey provider. We store the terms version, document fingerprint, server acceptance time, and signup method to document your agreement. Verification and password-reset messages are operational communications, not marketing consent.

Connected apps

You can let a third-party app, such as an AI assistant that uses the Model Context Protocol (for example Claude), read your portfolio through Sign in with Tradeval. When you approve it, we record the app, the access you granted, and when; tokens we keep are stored only as fingerprints (hashes), never in readable form. Access is read-only: the app can read your account nicknames, institutions, account types, last four digits, balances, positions, and their valuations, and cannot trade, move money, or change your records. Access tokens last up to one hour and refresh tokens up to 30 days from last use. You can see and disconnect connected apps at any time in Settings, which stops further access. Information an app has already received is held by that app and its provider under their own privacy practices, which we do not control.

Cookies, local storage, and technical information

Session cookies keep you signed in. The application also uses browser storage for preferences and cached prices, valuations, catalysts, and stories. Browser storage may remain after closing a tab, so take care on shared devices. Requests and security records may include IP addresses, browser user agents, timestamps, requested URLs, and authentication outcomes. Browser history, autofill, and downloads are separately controlled by your browser. Blocking cookies may prevent account features from working; clearing browser storage removes local caches, not server-side portfolio records.

Purposes and providers

We use information to authenticate users, provide requested research and portfolio tools, calculate scenarios, maintain records, send account messages, prevent abuse, investigate problems, and comply with law. Our service providers process information needed for their roles: the site, application servers, and databases are hosted on Amazon Web Services (AWS) in the United States, and account emails are sent through Amazon Simple Email Service. Market-data providers such as Yahoo Finance receive the tickers or search terms needed to retrieve data, not your identity. Google and external social, news, and exchange links have their own privacy practices. We may disclose information when legally required or reasonably necessary to protect legal rights, or in a business transfer subject to applicable law. We do not currently charge for the Service, operate advertising profiles in this application, or sell personal financial inputs. Acceptance of our Terms does not authorize marketing.

Retention and deletion

Saved account and portfolio data remain available while your account is active unless you remove them. Deleting an account revokes access and removes or anonymizes live identity and related records according to the service workflow. Security cleanup is configured to remove login-attempt records older than 90 days and audit entries older than 730 days; these are operational targets, not guarantees of immediate erasure. Terms-acceptance records may remain with a pseudonymous deleted-account record to document the agreement. Logs, caches, backups, and records required for legal or security purposes may persist separately. We do not promise a universal backup-deletion deadline. Contact us to request deletion or clarification about a particular record.

Your choices and requests

You can correct supported account details, manage sign-in methods, edit or remove saved portfolios, disconnect connected apps, and delete your account in Settings, or by emailing bmbtgroup@gmail.com. To obtain a copy of the personal information we hold about you, email us from the address on your account. Depending on your location and applicable law, you may have rights to access, correct, delete, or obtain a copy of personal information, or object to or restrict certain processing. We may verify identity before responding and retain information where law permits or requires it. Do not send passwords with a request. You may also contact the relevant privacy regulator. Using public research without an account avoids collection of registration details, but still involves ordinary technical requests.

Security, location, and eligibility

We use safeguards such as password hashing, session protections, and access controls. No system or transmission is guaranteed secure. Providers may process data in the United States or other locations, whose laws can differ from yours; any required transfer safeguards remain applicable. The Service is intended for adults aged 18 or older. If you believe a child has provided information, contact us so we can investigate and take appropriate action.

Changes and contact

We will identify revisions by date and provide appropriate notice of material changes. Where law requires additional consent, we will request it. For privacy questions or requests, contact Dover Industries LLC at bmbtgroup@gmail.com. This notice does not waive any statutory privacy or consumer rights.