

Conflict of Interest Policy

Consulting & Professional Services

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This guide explains what the tool produces, how to use the output, and what to watch for. The actual output (draft/report) is generated on the tool page.

Background

Get a conflict of interest policy — full policy text, how to identify when conflicts arise, how to manage them (disclosure, information walls, declining, consent), and a COI register. Adapt to your services and take professional advice. Fill in your details below.

Purpose of this tool & output

Manage competing client interests

How the output is used

Adopt a conflict-of-interest policy to manage competing client interests transparently.

Who receives it

Approved by the firm; applies to all partners, staff and associates.

Important cautions

AI-generated policy; adapt to your services and take professional advice.

Companion documents

- Confidentiality Policy
- Professional Ethics Code
- Data Privacy Policy
- IP Ownership & Usage Policy
- Liability & Risk Management
- Professional Indemnity Insurance Guide

This is AI-assisted guidance. Verify with a qualified professional before any binding decision. Fees, authorities and processes vary by state and change over time — confirm with your state authority.