

## ARTIFICIAL INTELLIGENCE ETHICAL USE POLICY

**Artificial Intelligence Policy**  
**Effective Date: XXXX XXXX**

### **Introduction**

This policy outlines the guidelines and procedures for the ethical, secure, and productive use of artificial intelligence (AI) tools by associates and staff of Coldwell Banker Elite. It aims to ensure that AI use aligns with the brokerage's values, complies with all applicable laws and ethical standards, and upholds our professional reputation.

Associates and staff are encouraged to explore AI tools as part of their business development, marketing, and client service workflows. However, such exploration must remain within the boundaries of professional conduct, privacy, and legal compliance.

### **Section 1: AI Data Management**

#### **1.1 Data Protection and Security**

Associates and staff may not upload or input any confidential or personally identifiable client information into AI platforms unless specifically approved by the brokerage and the tool is contractually compliant with data privacy regulations. Access to client data must be limited to authorized personnel and handled with care, whether manually or through automation.

#### **1.2 Data Quality and Integrity**

Associates must review, edit, and take full responsibility for any content produced by AI before public dissemination. AI-generated content must be fact-checked, compliant with all fair housing laws, and should never mislead or misrepresent. The same standards that apply to human-created content apply to AI-generated material.

#### **1.3 Data Ownership**

Associates and staff must ensure they have full rights and legal permissions to use any data, content, or assets fed into or generated by AI tools. You can't use AI to remix copyrighted or third-party-protected work unless you hold the appropriate licenses or have confirmed public domain status.

## **Section 2: AI Use and Governance**

### **2.1 Transparency and Explainability**

AI-generated interactions and outputs—especially those directly seen by consumers—must be transparent. If clients are interacting with AI (e.g., chatbots, voice assistants), there must be clear, timely, and written disclosure that the interaction is not human. When required by MLS or advertising platforms, agents must disclose that AI was used in the creation of content.

### **2.2 Human Oversight and Control**

AI is a tool, not a decision-maker. All content, decisions, and representations created with AI tools must be reviewed and approved by a human before distribution. Agents cannot abdicate responsibility to the machine.

### **2.3 Use of Mainstream and Reputable Tools**

Associates are encouraged to adopt mainstream, reputable AI platforms that are widely used and supported by trusted organizations. This is not the space to experiment with fringe or unvetted technology. When in doubt, ask.

## **Section 3: AI Ethics and Responsibility**

### **3.1 Ethical Use**

The same ethical, legal, and professional standards that apply to human-created work apply to AI-generated content. That includes compliance with the REALTOR® Code of Ethics, fair housing laws, MLS rules and all state, local, and national regulations.

### **3.2 Citations and Source Accuracy**

Any AI-generated content that includes statistics, data points, legal or regulatory claims must include a verifiable citation. Agents must independently verify all information before publishing or sharing.

### **3.3 Knowledge Scope and Licensing Boundaries**

Agents may not use AI to generate content or advice that falls outside their license authority or professional expertise. All AI-assisted output must be within the scope of what the agent personally knows to be true. No guessing, no hoping the AI got it right. When disseminating content created by AI, reasonable effort shall be made to share reputable citations (such as links to county or state websites confirming the information)

### **3.4 Disclosure of Recording or Transcription Tools**

Agents must disclose the use of any AI-driven transcription, voice recording, or meeting analysis tools during client meetings—either verbally at the start of the recorded session as to have it in the recording or through clear written notice. Trust is the currency here; transparency builds it. Although some states served by our company only require a single party to consent, we will still make known to the consumer that they are being recorded.

### **Section 4: Continuous Evaluation**

Associates and staff are expected to stay current on evolving AI tools and best practices, and are welcome to participate in training or compliance refreshers when provided by the brokerage. Periodic policy updates will be communicated as AI capabilities, regulations, and risks evolve.

#### **Conclusion**

AI can be a phenomenal asset—but like any tool, it must be used wisely, safely, and ethically. Coldwell Banker Elite supports innovation, but not at the cost of professionalism or consumer trust.

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