



AI Use Policy for Brokers

Guidelines for responsible, compliant, and secure use of artificial intelligence tools in Company business activities.

Policy Guidelines

Permitted Use and Approved Tools

- AI tools may be used only for legitimate business purposes that are consistent with Company policies, applicable laws, and the REALTOR® Code of Ethics.
- Only Company-approved AI tools may be used in connection with Company business activities. The Company Manager shall maintain a list of approved AI tools. Legal review and management approval are required before deploying AI in high-risk applications, including consumer-facing chatbots, automated marketing campaigns, property valuation tools, transaction document preparation, and any system that processes client financial information.

Data Privacy and Confidentiality

- No client information, financial data, transaction records, personally identifiable information, or other sensitive or confidential information may be entered into an AI system without prior approval from the Company Manager. Any third-party AI platform must be governed by contractual terms that expressly prohibit the vendor from using Company or client data to train, improve, or develop its AI models.

MLS Data Restrictions

- AI tools may not be used to scrape, redistribute, aggregate, or repurpose MLS data in violation of MLS rules, licensing agreements, copyright restrictions, or data-sharing policies.

Human Review Requirements

- Associates and staff must review any AI-generated content before it is:
 - Published or distributed;
 - Sent to a client, customer, or member of the public;
 - Used in advertising or marketing materials;
 - Included in transaction documents, disclosures, or communications; or
 - Relied upon in the preparation of a Comparative Market Analysis (CMA), Broker Price Opinion (BPO), or property valuation.

Licensed Activity and Professional Judgment

- AI systems may not independently perform activities that require a real estate license, establish agency relationships, negotiate transactions, provide legal advice, or create, imply, or modify legal obligations on behalf of the Company.

Fair Housing, Advertising, and Marketing

- All AI-generated listing descriptions, advertisements, and marketing materials must comply with federal, state, and local fair housing laws. Associates shall not rely on AI-generated content describing neighborhoods, schools, demographics, crime rates, cultural characteristics, or other community attributes without careful human review to identify and eliminate potential bias, discriminatory language, or steering concerns.
- The use of AI to generate images, videos, or virtual staging must be disclosed when the AI materially alters a property's appearance, in accordance with Business and Professions Code § 10140.8 and applicable MLS rules.

Consumer-Facing AI Systems

- AI-powered chatbots and virtual assistants used on Company websites, social media platforms, messaging applications, or other consumer-facing channels must:
 - Clearly disclose that the user is interacting with an AI system;
 - Refrain from providing legal advice, financial advice, lending recommendations, or property valuations;
 - Be configured to transfer inquiries to a licensed real estate professional when discussions involve transaction-specific questions, pricing, negotiations, agency relationships, contracts, disclosures, or other matters requiring professional judgment.

Reporting, Enforcement, and Training

Incident Reporting and Corrective Action

- Any suspected misuse of AI, unauthorized disclosure of confidential information, fair housing concern, inaccurate AI-generated content, cybersecurity issue, or other AI-related incident must be reported immediately to the Company Manager or designated supervisor. The Company shall promptly investigate reported incidents and implement corrective actions as appropriate. Violations of this policy may result in mandatory retraining, suspension or revocation of AI tool access, disciplinary action up to and including termination of employment or an independent contractor

relationship, referral to legal counsel, and/or reporting to applicable regulatory authorities when required by law.

Compliance Responsibility and Annual Training

- The Company Manager or designated supervisor is responsible for ensuring compliance with this policy by all Associates and staff under their supervision. All Associates and staff shall complete AI-related training at least annually. Such training should address acceptable use of AI tools, data privacy and security, fair housing compliance, advertising and disclosure requirements, risk management, and incident reporting procedures.

Want the Complete Office Policy Manual?

The AI section is just one chapter of the comprehensive Real Estate Office Policy Manual, which contains policies and procedures covering office operations, risk management, compliance, technology, employment matters, and much more.

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