SAMPLE. Prepared for a fictional firm to show the format. These are templates for the firm and its counsel to adapt. They are not legal advice.

Using AI in your practice, consistent with ABA Formal Opinion 512

Three parts: a guide to the opinion, sample consent and notice language, and a firm AI-use policy template.

> ABA Formal Opinion 512, *Generative Artificial Intelligence Tools* (July 29, 2024), explains how existing duties apply when lawyers use AI. The Arkansas Rules of Professional Conduct are based on the ABA Model Rules, but the firm should confirm current Arkansas rules and any guidance from the Arkansas Supreme Court or Arkansas Bar Association before adopting these documents.

Part 1. Guide: what the opinion expects and how it's met

Duty	What Opinion 512 expects	How the Intake Assistant and the firm meet it
Competence Rule 1.1	Understand the tool's capabilities and limits well enough to use it responsibly. Review its output; don't rely on it uncritically.	Staff training at go-live and quick-start guides. Every draft and conflict report is reviewed by an attorney before anything is sent.
Confidentiality Rules 1.6, 1.9(c), 1.18(b)	Evaluate the risk that client information is disclosed or accessed. Before entering client information into a self-learning tool, get the client's informed consent; boilerplate engagement-letter language is not enough.	Names and numbers are redacted before text reaches an AI model; the provider may not train on firm data; NSL keeps no copy of inquiry content; access is limited to the intake mailbox. See the Confidentiality Architecture Report. Consent and notice language is in Part 2.
Prospective clients Rule 1.18	Information from a prospective client is protected and can disqualify the firm from representing the other side.	Conflicts are searched before any substantive reply, and the reply is held until an attorney clears them. Intake collects only what's needed to check conflicts until then.
Communication Rule 1.4	Tell clients about AI use when it matters to the representation, such as when their information is entered or the output shapes a significant decision, and always if they ask.	Website and intake-form notice, plus an engagement-letter clause (Part 2).

Candor and merit Rules 3.1, 3.3, 8.4(c)	Verify AI output, including every citation, before relying on it or filing it.	The Intake Assistant does not research law or draft filings. For other AI use, the policy (Part 3) requires citation checks.
Supervision Rules 5.1, 5.3	Managing lawyers set clear policies, train lawyers and staff, and vet outside providers' security, confidentiality and data terms.	The AI-use policy (Part 3), training, and NSL's architecture report, insurance certificate and data-handling terms for vendor review.
Fees Rule 1.5	Bill hourly only for time actually spent. Don't bill clients for learning a general-purpose tool. General AI tools are usually overhead; any AI-related charge needs advance disclosure.	The Intake Assistant is firm overhead and is not billed to clients. The policy (Part 3) sets billing rules for other AI use.

Part 2. Sample consent and notice language

Opinion 512 says general boilerplate is not enough when informed consent is required. These samples are deliberately specific: they say what tool is used, for what, what protections apply, and what the client can choose. Replace highlighted text.

A. WEBSITE AND INTAKE FORM NOTICE (PROSPECTIVE CLIENTS)

How we handle your inquiry. To respond quickly, Sample Firm, PLLC uses a secure intake assistant that organizes new inquiries, checks them against our records for conflicts of interest, and prepares a draft reply. An attorney reviews every reply before it is sent. Before any text is processed by an artificial intelligence model, your name and identifying details are removed, and the AI provider may not use your information to train its models. Please share only what's needed to describe your situation until we confirm we can help you. If you'd prefer that we not use this assistant for your inquiry, call us at (555) 555-0100.

B. ENGAGEMENT LETTER CLAUSE (CLIENTS)

Use of technology, including artificial intelligence. We use technology tools to serve you efficiently. These may include artificial intelligence (AI) tools that help us organize information and prepare first drafts of routine correspondence. Specifically:

1. **What we use.** An intake and correspondence assistant operated for our firm by Natural State Logic, and [list any other AI tools the firm uses with client information].
2. **Protections.** Before any text is processed by an AI model, names and identifying information are removed. Our providers may not use your information to train AI models and must keep it confidential and secure.
3. **Lawyer responsibility.** A lawyer reviews any AI-assisted work before it is relied on or sent. AI tools do not make legal judgments in your matter.
4. **Fees.** You will not be billed for time an AI tool saves us, and we do not bill you for these tools as separate costs [or: describe any charge].
5. **Your choice.** You may ask us not to use AI tools with your information, or ask questions about how we use them, at any time. Declining will not affect the quality of our representation, though some tasks may take longer.

☐ I consent to the use of AI tools as described above. ☐ I do not consent.

Client signature _____ Date _____

C. SHORT ANSWER WHEN A CLIENT ASKS

"Yes, we use a secure assistant to organize inquiries and draft routine correspondence. Your name and identifying details are removed before anything reaches an AI model, the provider can't train on your information, and a lawyer reviews everything before it goes out. If you'd rather we not use it for your matter, just tell us."

Part 3. Firm AI-use policy (template)

Adopted by Sample Firm, PLLC on [date]. Owner: [managing partner]. Reviewed at least every 12 months.

1. Purpose and scope

This policy governs how every lawyer, staff member and contractor of the firm uses artificial intelligence tools, including generative AI, in firm work. It applies on firm and personal devices.

2. Approved tools

Only tools on this list may be used with client or prospective-client information. The managing partner approves additions after reviewing the vendor's security, confidentiality, data retention and training terms.

Tool	Approved use	Client information allowed?
NSL Intake Assistant	Intake summaries, conflict search, draft replies	Yes, through its built-in redaction
[other tool]	[use]	[yes/no]

3. Prohibited

- Entering client or prospective-client information into any tool not on the approved list, including free or personal accounts of public chatbots.
- Sending, filing or relying on AI output that a lawyer has not reviewed.
- Using AI to make a conflict decision, give legal advice without lawyer review, or communicate with a court.

4. Confidentiality

- Use the minimum client information needed for the task.
- Get informed client consent before using client information in any tool that may learn from it or disclose it outside the firm (see Part 2).
- Honor any client's request not to use AI with their information. Record it in the matter.

5. Verification

- A lawyer reviews all AI-assisted work for accuracy, completeness and tone before use.
- Every legal citation, quotation and factual assertion from an AI tool is checked against the original source before filing or sending.
- Conflict reports are leads, not conclusions. A lawyer makes every conflict decision and records it.

6. Supervision and training

- Every lawyer and staff member completes AI training before using approved tools, and annually after.
- Supervising lawyers are responsible for AI use by those they supervise.

7. Billing

- Bill hourly work only for time actually spent, including time spent reviewing AI output.
- Do not bill clients for time spent learning general-purpose AI tools.
- AI tool subscriptions are firm overhead unless a charge is disclosed to and agreed by the client in advance.

8. Incidents

Report any suspected misuse, data exposure or significant AI error to [managing partner] the same day. The firm will assess its duties to affected clients and contact the tool's provider.

9. Acknowledgment

I have read this policy and agree to follow it.

Name and signature · Date	Role

Prepared by Natural State Logic as a template based on ABA Formal Opinion 512 (July 29, 2024) and the ABA Model Rules of Professional Conduct. It is not legal advice. The firm's own counsel should review and adapt these documents and confirm current Arkansas rules and guidance before use.