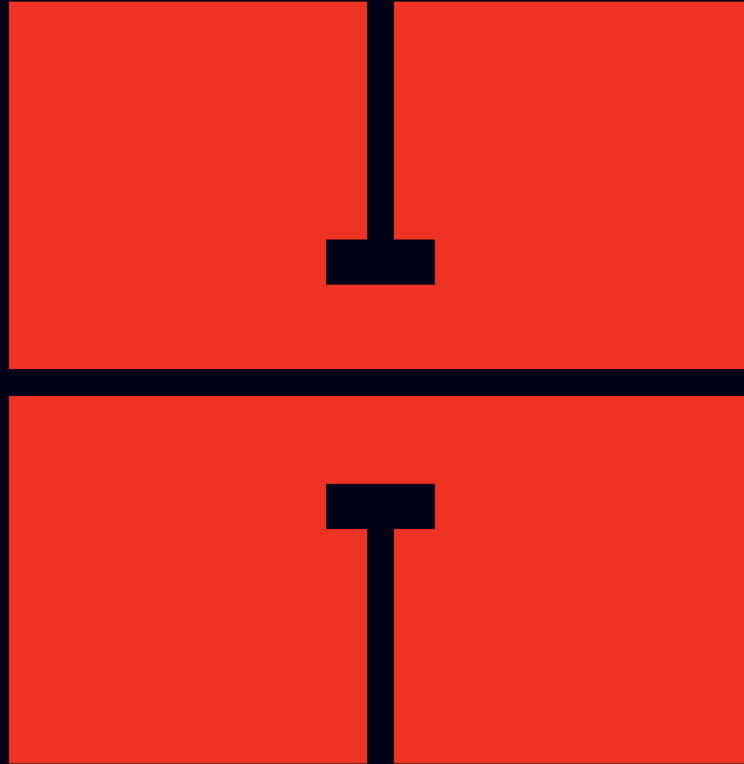


# THE HARRIS WAY



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**Mission, Vision,  
Core Values,  
and Ethical Guidelines**

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**Harris & Associates**<sup>SM</sup>

# The Harris Way

**Mission, Vision,  
Core Values,  
and Ethical Guidelines**



**Harris & Associates**<sup>SM</sup>

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# Preface

## OUR ETHICS

Our company ethics and values are very important to me, as I hope they are to you. Over the past 31 plus years I have witnessed the evolution of our ethics. Until now, we never had a document capturing what our ethics are. We relied on examples of individuals and word-of-mouth. This worked okay when we were a smaller company, but today, with many new employees joining each year, it is important to instill our ethics as quickly as possible. Our new Ethical Guidelines will help this process.

To me, the bottom rung on the ethics ladder is “what is legal.” We want to continue to move higher on the ethics scale by striving to do “what’s right.” Our ethics are lofty, something we always try to achieve. The best measure of our company is not how much money we make, but what we stand for.

Good ethics also makes good business. We are in the business of serving our clients, staff, and communities for the long haul. Adhering to strong ethical principles will insure our company’s long-term success.

I am very proud of our current ethical values and am proud of how we are perceived by our clients and peers. I definitely want this to continue as my legacy.

Please take time to read, understand, and embrace our Mission, Vision, and Core Values and Ethical Guidelines. This is a work in process, a living document, so your comments and suggestions are always welcome to help us make this document more meaningful and current through the coming years.

**Carl Harris**  
Founder & Chairman of the Board



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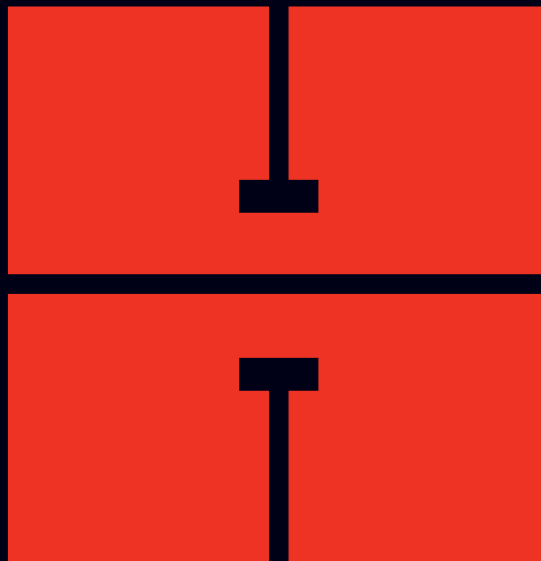
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# Ethics and Values Matter

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# 1. Ethics and Values Matter

by Guy Erickson, President, Harris & Associates

Ethics and values *matter* deeply and profoundly at Harris & Associates. Our success as a company for more than 30 years is not just because of a favorable economy, smart people, and hard work. As Carl Harris and any other veteran of our company will tell you, our core values and ethical standards are at the heart of our success.

A lot of companies fell into very serious trouble in recent years by ignoring or losing sight of their ethics and values. A notable American accounting firm was destroyed, and disappeared almost overnight when it forgot the values and ethics that made it great. It became terribly compromised by unethical dealings with other companies. It can happen in any industry, including our own. Thirty years of success are no guarantee of the future if we forget the values and ethics that got us here.

*It's not rocket science - just common sense.*

- **If we are unethical with our clients - we lose their trust, their respect, and their business.**
- **If we are unethical with our business partners - they will avoid working with us.**
- **If we are unethical with each other in the Harris "family" - we become dysfunctional.**

But even this common sense business case for ethics and values doesn't get to the true heart of the matter. For Harris, ethics and values are not just about preventing bad things from happening. Our ethics and values form our fundamental corporate "DNA" — they are the core characteristics of who we are, not just some rules about what *not* to do. Ethics is about achieving excellence and success, about taking pride not just in "what we do" but in "how we do the things we do." If we are unethical with ourselves, we destroy a part of our being.

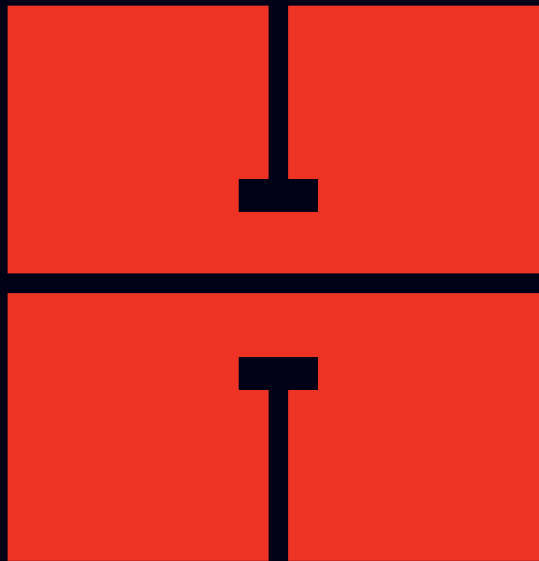
As our company grows toward five hundred employees . . . as we branch out throughout the Western United States . . . and as our founding generation of company leaders moves toward retirement . . . we have called upon everyone in our company to help voice our central mission, vision, core values, and ethical guidelines. Ethics and values are everybody's business at Harris. Our calling as a company is to live these values and ethics day to day — to be familiar with our guidelines, apply them in our decision-making and actions, and pass them along to our colleagues and business partners.

What you see in this document is the product of more than 300 Harris voices. This is a living document that will be regularly reviewed, revised, and improved upon based on your input. Help us make it count in our business experience at Harris. **Help us make it better.**

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# Our Mission and Vision

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## 2. Our Mission and Vision

The Harris Mission is a statement of our core purpose. It is a brief summary of why we exist. It is the unifying theme in all the projects we undertake. The mission is our “guiding star.” It is our ultimate “boss.” Every task and every project at Harris should contribute to this basic, core purpose.

### The Harris Mission

**Helping clients, employees, and communities succeed through industry-leading management and consulting services.**

- We serve our clients as their partner and advocate, bringing our expertise and dedication to their projects from start to successful finish.
  - We provide our employees with opportunities for creativity, growth, and career success in a supportive, fun, and rewarding team environment.
  - We protect and improve our community and environment through responsible stewardship of our shared resources.
- 

The Harris Vision is a description of what we want to be---and will be---if we carry out our core mission successfully. This is how we see our company and our future. This is how we want to be seen by others.

### The Harris Vision

**The excellence and integrity leader among management and consulting companies.**

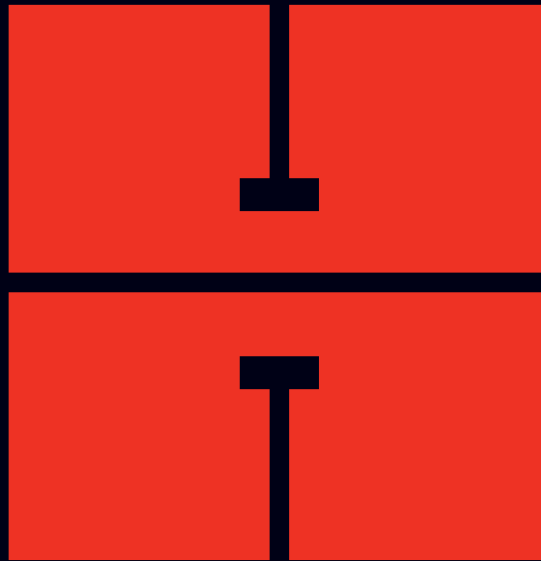
The Harris Vision is not to be the biggest but the best in our areas of operation. We want to continue to grow our company in a sustainable manner that does not compromise our core mission and values or the health of our company culture.

- We want to be the first choice of clients seeking management and consulting services, with a reputation for exceptional ethics, expertise, and client focus.
- We want to continue to attract and retain great people, drawn by our reputation for innovation, opportunity, and satisfying work environment.
- We want to be valued as model corporate citizens by all the communities in which we operate, with a reputation for generosity, responsiveness, and wise stewardship.

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# Our Core Values

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## 3. Our Core Values

Our core values are the six essential characteristics we want to have embedded in every part of Harris & Associates. Our experience of more than three decades as a company has demonstrated that our excellence and success depend on these six key traits. Every project, every region, every policy, every decision, and every employee is expected to be guided by these values while working at Harris.

### Harris Values

In carrying out our mission and pursuing our vision, we are shaped and guided by six core values:

#### **Integrity:** “doing the right thing”

We are about honesty, fairness, and responsibility, about consistently living out our values and principles with uncompromising integrity and ethics.

#### **Quality:** “doing things right”

We have a passion for excellence and high standards, for industry-leading innovation, expertise, and effective performance.

#### **Reliability:** “you can count on us”

We do what we say---and we stand behind what we do---with accountability, responsiveness, and follow-through, from project start to project finish.

#### **Respect:** “everyone is important”

We value and respect every member of our team---whatever their role---and each of our clients, business partners, and communities.

#### **Teamwork:** “working better together”

We team with each other and our clients to meet challenges and then share the success. It’s about collaboration, approachability, good listening, and sharing ideas.

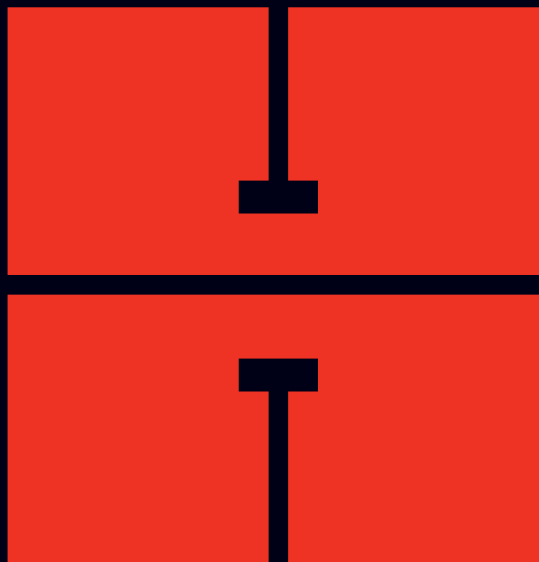
#### **Fun:** “more than just a job”

We enjoy our work and our fellow workers, experiencing personal freedom, creativity, and growth in a “family” atmosphere of mutual support and celebration.

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# Our Ethical Guidelines

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## 4. Our Ethical Guidelines

### 4.1 Introduction

Our mission and vision describe *where* we are going as a company. Our core values describe *who* we are, the kind of organization we are building. Our ethical guidelines describe “*how* we do the things we do.” Every Harris employee is expected to be familiar with these guidelines and comply with their provisions. Ethics at Harris is everybody’s business. It is the responsibility of every employee to carry out their work in an ethical manner, to report any questions or possible violations, and to suggest ways of improving this code and, more generally, the ethical health of our company.

### 4.2 General Principles and Guidelines

In addition to the more specific ethical guidelines which follow below (section 4.3), the following 12 general principles guide ethics at Harris, in all of our relations with clients, business partners, fellow employees, or anyone else. These guidelines supplement the policies and procedures outlined in the Harris Personnel Policies Manual.

- **Do no harm.**
  - Follow this basic, historic, first rule of professional ethics at all times.
- **Comply with applicable laws and regulations.**
  - Observe the legal ground rules of our society and marketplace (e.g., concerning copyright, building codes, environmental impact, taxes, etc.) at all times.
  - Never compromise or violate a law even if a client or business partner asks for it and says they will take responsibility for it.
- **Comply with relevant codes of professional ethics.**
  - Observe the standard ethical guidelines espoused by professionals working in our vocational and business areas (e.g., the American Society of Civil Engineers, the Construction Management Association of America).
- **Treat others as we would want to be treated, with honesty, fairness, dignity, and respect.**
  - Use the classic “Golden Rule” as one helpful guide in figuring out the right thing to do.
  - If in any doubt, ask some colleagues how they would want to be treated in a given situation.
- **Protect life, health, and safety.**
  - Rectify or report immediately any unsafe or threatening situations.
  - Accept responsibility for any unsafe conditions we may have caused or contributed to and take corrective action.
  - Pursue the highest standards in safety, whether on Harris property, in transit, or at a project site.
  - Never compromise safety at any stage from project design, to execution, to final inspection.

- **Fulfill commitments, contracts, agreements, and promises.**
  - Follow through completely and reliably on agreements made with clients, business partners, and fellow employees.
  - Make any changes in such commitments only by mutual agreement and in a transparent, above-board manner.
  
- **Maintain fairness in business and financial matters.**
  - Avoid both the appearance and the reality of any kind of financial or business impropriety.
  - Deliver the full value service that has been purchased from Harris.
  - Compensate employees, sub-consultants, and business partners fairly for services rendered.
  - Ensure that invoicing and billing practices are accurate and fully justified, whether dealing with clients, business partners, or personal expense reimbursements.
  - Avoid real or potential conflicts of interest that could arise from giving or receiving gifts, dealing with relatives or close friends, or from any other source.
  - Avoid improper tampering with the employees, operations, inside information, or intellectual property of other companies.
  
- **Never compromise on truthfulness and accuracy.**
  - Maintain clarity, consistency, and accuracy in all communications with clients, contractors, business partners, employees, governmental agencies, and the public.
  - Never submit deceptive, incomplete, or inaccurate proposals, financial reports, or inspections.
  - Do not over-promise on schedules, project outcomes, or personnel; disclose any contingencies and concerns.
  - Correct mistakes, misstatements, and misleading communications immediately.
  
- **Respect privacy and protect confidential and proprietary information.**
  - Protect the privacy of individuals and their records, whether Harris employees or not.
  - Protect the confidentiality of the proprietary information, business plans, and communications of Harris and its clients and business partners.
  - Do not accept or misappropriate any confidential information or proprietary data from a competitor company; respect always the rights of the rightful owners of information.
  
- **Maintain respectful and professional relationships.**
  - Communicate (voice, written, e-mail, or otherwise) in a respectful and professional manner to fellow workers, clients, partners, contractors, competitors, and all others.
  - Maintain a professional and inoffensive personal appearance and work environment.
  - Avoid behavior or communication that could come across as disrespect, harassment, or a lack of courtesy or professionalism.
  
- **Be open to criticism, admit mistakes, take responsibility, and take corrective action.**
  - Take the initiative to improve your own performance.
  - Do not hide from criticism, evade responsibility, or try to pass the buck.
  
- **Address questions, criticisms, and admonitions directly and privately with the persons involved.**
  - Take the initiative to address issues with others as soon as possible.
  - Do not go behind people's backs with complaints.
  - Do not risk humiliating people in front of others.

## 4.3 Specific Guidelines

### 4.3.1 Clients

- **Developing Business**
  - Market our services and develop our business by telling the truth, the facts about Harris experience, expertise, and client service.
  - Build positive relationships with potential clients and demonstrate our collaborative style and orientation.
  - Never engage in, or respond to, manipulative, unprofessional, or unethical business development tactics.
- **Working With Clients**
  - Provide loyal and competent representation of the client at all times during the contract.
  - Inform clients fully and clearly about the risks, options, and possible ramifications of choices; provide fair and objective advice to enable sound client decisions.
  - Protect the client's budget and best interests.

### 4.3.2 Contractors and Business Partners

- **Choosing Business Partners**
  - Choose business partners based on their qualifications and availability, and on client needs.
  - Maintain openness, transparency, and objectivity in determining business partnerships.
- **Working with Contractors and Business Partners**
  - Partner with contractors to deliver excellent results to clients.
  - Maintain open, honest, and adequate communications with contractors and other business partners.
  - Encourage and facilitate open communication among clients, contractors, business partners, and managers with full disclosure of relevant developments, challenges, problems, and opportunities.
  - Provide competent information and advice to clients on contractor issues and concerns.
  - Never agree to any work that is substandard, out of compliance with codes and regulations, or cuts corners to save money or time.
  - Ensure that inspections are carried out in an objective, competent, transparent manner.

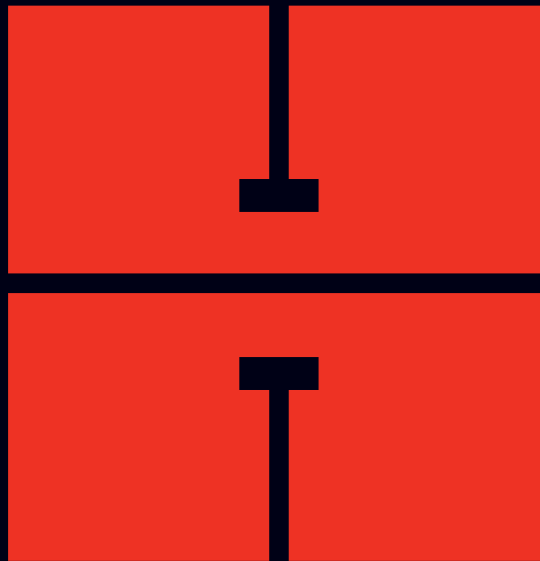
### 4.3.3 Employees

- **Employee Recruiting & Hiring**
  - Recruit employees by honestly and effectively communicating the facts, opportunities, and benefits of employment at Harris.
  - Seek a workforce characterized by a rich diversity in terms of age, experience, gender, ethnicity, and cultural background.
  - Seek prospective employees whose values and purposes are in alignment with the mission, vision, and core values of Harris.
  - Refer interested individuals to the Harris web site and to our Human Resources department. Do not engage in "raiding" of employees of other firms.
- **Working for Harris**
  - Treat all fellow employees with integrity, dignity, respect, and care, valuing everyone's role on the Harris team.
  - Carry out individual assignments with competence, diligence, and pride.
  - Build teamwork and healthy, open, honest communication.
  - Contribute to the fun and family atmosphere at Harris, but do not violate basic norms of professional behavior.
  - Use company equipment, resources, and assets appropriately and responsibly.
  - Refrain from behavior away from work which could create a conflict of interest, tarnish the reputation of the company, or affect your ability to carry out your job at Harris.

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# What to do if you have an ethics question- or need to report a possible violation

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## 5. What to do if you have an ethics question— or need to report a possible violation

### **Step #1: Reflection: *Is your concern important enough to take any action?***

If you become aware of a possible ethics issue in our company (or on the part of a client or business partner we are working with), here are five test questions to help you determine if you should take action. If the answer is “Yes” to one or more of these five test questions, you should take action and make an inquiry or report. *It may not turn out to be a serious problem---*but it is important to take action to find out.

**1. Is it illegal?**

Anytime you see something that might be breaking a legal or regulatory standard, report it.

**2. Does it violate our company values and ethical guidelines?**

Anytime something may be in contradiction to one of our core values or in violation of one of our ethical guidelines (or of a relevant professional ethical guideline, e.g., the code for civil engineers), report it.

**3. Does it violate the Golden Rule or your internal sense of right and wrong?**

If you wouldn't want it done to you, we probably shouldn't do it to others. If it really bothers your personal conscience and values, it probably would bother others. Report it.

**4. Would we be doing this if it was the lead story in the news?**

Individuals and companies doing wrong things usually try to hide what they are doing. If you wouldn't feel good about having the public know and see what we are doing, report it.

**5. Could someone be seriously and irresponsibly harmed?**

This is a bottom line question in ethics. If anyone could be seriously and irresponsibly harmed (physically, financially, reputationally, etc.), report it.

### **Step #2: Action: *How should I report a question or possible violation?***

If possible, start with the first three steps (below) to report and resolve ethical questions and challenges. If these steps seem dangerous, unwise, or unproductive, or you are not satisfied after pursuing them, move to any of the final three steps:

**1. Speak to the offender(s).**

It is not always possible to take your concerns to the (apparent) offender doing an unethical act. When possible, however, this is the place to begin.

**2. Ask a trusted colleague for advice or help.**

Sometimes ethical questions can be answered and problems resolved by simply discussing the matter with a colleague or two.

**3. Report it to your supervisor.**

Your supervisor is responsible for ethical as well as business matters. Unless the ethics question concerns your supervisor personally, or you remain unsatisfied by your supervisor's response, you should take the matter to him or her.

**4. Report it to any supervisor or manager with whom you feel comfortable.**

All managers and supervisors at Harris are available to all employees for ethics matters.

**5. Report it to the Human Resources Manager.**

The Human Resources Manager will always be available to provide help with your ethics questions and reports.

**6. Report it to the President.**

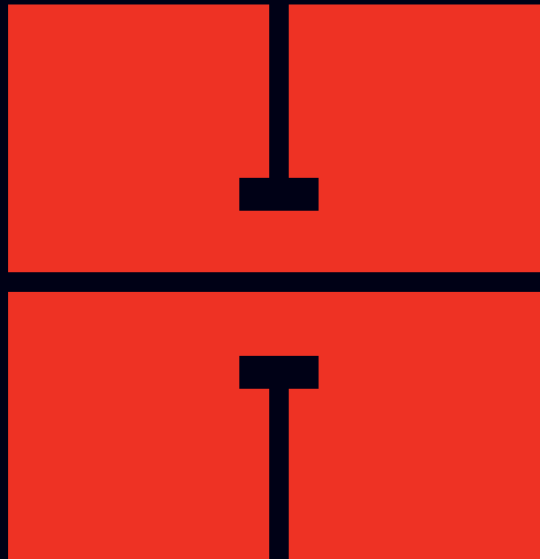
The President of Harris & Associates always has an open door for anyone who wishes to raise a question or make a report on any ethical matter.

**You may submit your question or report anonymously by letter if you feel it necessary.**

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# What happens to your ethics questions and reports?

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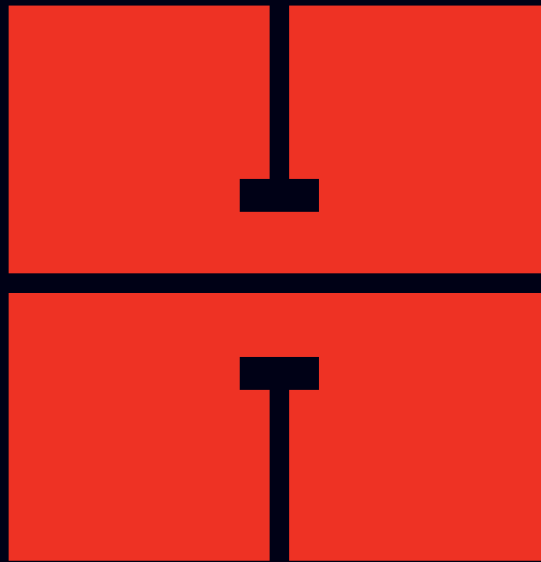
## 6. What happens to your ethics questions and reports?

- **All ethics questions and reports** of possible violations are taken very seriously by the company.
- **There will be no retaliation for raising ethical questions or reporting possible violations;** it is the obligation of every employee to report any violations and to protect the ethical health of the company.
- **If your question or report is not anonymous** and is submitted to a supervisor or manager (including the Human Resources Manager and President), it will be acknowledged in an appropriate and timely manner.
- **If the issue can be resolved by the supervisor receiving the question or report,** it will be addressed and resolved as quickly as possible and you will be informed of the decision and action.
- **If the issue cannot be resolved quickly,** easily, or satisfactorily by that supervisor you may be contacted for further discussion of the specific issue or, the supervisor will consult with others on the management team, taking it as far as the President and Board of Directors, if necessary, until a satisfactory resolution can be found.
- **A decision will be made by management,** subject always to the approval of the Board of Directors, and corrective action will be taken to address the specific situation and those involved in it---and to reinforce or improve the policies, standards, and procedures of the company to minimize the possibility of such problems recurring.
- **Unless the report was submitted anonymously,** the reporting individual will receive a report on the company's resolution of the issue.

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# Frequently asked questions

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## 7. Frequently asked questions about values & ethics at Harris

It is both impossible and undesirable to try to write a rule or guideline for every conceivable ethical dilemma we might face. Acting ethically is a matter of making wise judgments about how to apply our values and principles to particular cases. In the following section, Harris leaders comment on cases and questions that have been submitted by Harris employees. Please submit any cases or questions you may have (to Human Resources Manager, Marie Shockley; *e-mail*: [mshockley@harris-assoc.com](mailto:mshockley@harris-assoc.com) or *phone*: 925-827-4900 x 202, or *write* 120 Mason Circle, Concord CA 94520) and you will receive a response as quickly as it can be prepared. Some cases, questions, and responses will be shared with the larger Harris community in our newsletter or on our web site. Published cases and questions may be edited for publication, and we will delete the authors' names from the published texts.

### Employee recruiting

Dear Harris:

I had a situation where I was working on a project with a sub-consultant who began asking me about what it is like to work at Harris---and whether we had any openings for someone like her. What should I say in a situation like that? She seemed like someone who would be a great addition to our company.

Dear Harris colleague:

These are difficult situations, but one of our basic ethical principles is to treat others as we would want to be treated. We do not want our employees approached by other companies and agencies when we send them out on a job---so we don't believe we should do it to others. Our specific guidelines for employee recruitment also direct us not to take advantage of such recruiting opportunities.

At most, what we think you can do ethically is say something like "We have a policy against tampering with the employees of our business partners while we are on a project together. If you are still interested when our project is over, I would suggest that you check out our web site and contact our HR department to get more information." Of course, if this person badgers you with questions about how you like Harris, you can share your personal feelings and experience. But be careful not to cross the line and make any recruiting moves.

—Marie Shockley, Human Resources Manager

### Receiving a Gift from a Contractor

Dear Harris:

When on a job site out-of-town, one of our contractors paid our green fees for a weekend round of golf and then the cost of an expensive dinner at the country club. We did chat most of the time about our project so it seemed like time well spent for our work relationship and the success of our project, even though we were also hitting golf balls. I tried to offer to pay for dinner but he said visitors can't pay at the club and he absolutely refused to hear of it. Oh yeah, and he also gave each of us in the foursome a sleeve of three golf balls with his company logo imprinted on them. Did I do the right thing here?

**Dear Harris golfer:**

Accepting the golf balls seems like a nominal gift unlikely to create a real or apparent conflict of interest (where your treatment of him and his company might be influenced by these gifts and favors). A nice touch is to reciprocate by giving him a Harris cap or something similar.

The green fee and expensive dinner is another matter. You should have made it clear beforehand that you would not join in for golf and dinner unless you could pay your own way. Always try to be aware of these situations before you get boxed into a corner that is embarrassing for everyone involved.

—Neil McCosker, Director of CM & Northern Regional Manager

**Booking Vacation Tickets on My Work Computer**

Dear Harris:

I recently logged on to my usual airline company to book my tickets for a vacation trip next summer. I did this on my Harris computer at my desk in our office. I had to do it during day hours because I might need to speak to an actual representative at the airline and they seem to be there only during day hours. I sometimes use my home computer to log on and do company work during evenings and on weekends so I felt that things balance out. I want to get your opinion on whether I am being ethical.

**Dear Harris traveler:**

You have posed a very difficult question, given the fact that, for many of us, our personal and business lives are so intertwined. This is where judgment comes in, rather than trying to find the “letter of the law.”

I personally would not feel comfortable booking a personal flight from the office and during working hours. It does not feel “right” for me. However, I understand the balancing-out concept, and you will need to do what is comfortable for you. See, this ethics business isn’t as easy as it sounds!

—Guy Erickson, President

**Billing time to Projects**

Dear Harris:

I am working on several great projects, but a couple of them are currently over budget. In order to make the projects appear to be in budget, my project manager has asked me to do this :

- For one project, to bill my hours to overhead activity numbers. However, doing this not only affects my utilization rate and possibly my yearly performance review and salary increase, but it paints an inaccurate picture of the amount of work that really went into the project.
- For another project, we have another contract with the same client that is under budget. My manager asked me to bill my over-budget hours to that project.

What should I do?

**Dear Harris Designer:**

When we propose on a project we are often times asked to include an estimate of our work effort and the assumptions they're based on. When these estimates are incorporated into a contract, we need to be very cognizant as to how and at what rate the budget is expended. If the project is running out of billable budget, the project manager must proactively notify the client as early as possible, to obtain additional budget or take other corrective actions. Quite possibly the original assumptions are very different from how the project is actually evolving and there is a legitimate reason to request more budget.

However, if we are unable to get additional budget, billing project work hours to overhead is never a good idea for just the reasons you give. And sometimes a client may reconsider a budget amendment after the project is complete and comes in under budget. Having accurate timesheet information will help recapture this budget.

And if we're doing multiple projects for a client with separate budgets, we should always get his/her concurrence before mixing up the budgets. If the client agrees, the budgets for the projects should be formally amended with new budgets established for each.

In both cases, you should talk with your project manager about the ethical and practical issues here. You should make known your discomfort in complying with the request.

—Vern Phillips, Director of Design Services

**Marketing Department Ethics**

Dear Harris:

The contractor on our jobsite recently told me that Harris had called him to ask for references for people seeking current jobs. They called the project engineer, since we work with him the most, seeking a reference for our inspector. But the contractor came to me wondering why they were doing that, saying it looks very bad to try and get a good reference out of someone when we are responsible for their quality control. He viewed this approach by Harris as a possible conflict of interest. I had to agree. How would our client view this if they were made aware of it?

**Dear Harris Construction Manager:**

In establishing our relationships with our clients, one of the key factors that we feel separates Harris from the other firms is the fact that we focus on getting the project done right the first time. Often times when we are responding to an RFP, we are required to give current references for all of our proposed staff. Normally, we would wait until the project is over to ask for a reference, but sometimes the request for references will include the contractor that is currently working with our staff.

When marketing asks for a reference from a contractor for one of our field personnel, we are looking for statements on how our employee interacts with the contractor. We want to know whether she/he works with the contractor to accomplish getting the job done, or if the Harris staff is adversarial. I would recommend that if approached you explain to the contractor and the owner that we are looking for comments about how our staff works with the rest of the team, and that we are looking for an honest reference. The ability to work effectively within the project team is a major consideration for selecting the Harris team.

—Jim Parmley, Director of Business Development

## **Entertaining Clients**

Dear Harris:

During my short time here I have observed our senior managers and business developers entertaining clients or potential clients. This has consisted of lunches, golf outings, sports events, and the like. It makes me wonder, are these practices ethical?

**Dear Harris observer:**

These practices are ethical when conducted in a proper way. At Harris, while building working relationships with our current or potential clients, we sometimes look for opportunities to meet with them in a more relaxed and casual atmosphere. However, in following the general principles and guidelines for all employees, we must “avoid real or potential conflicts of interest that could arise from giving or receiving gifts”.

Whether you are a business developer or a project manager taking a client out, you must establish an understanding with the client of their and our policies on sharing complimentary lunches, events, etc. Our policy is that these are done only for improving communication and working relationships with clients, and not for influencing them in any way. Once this understanding has been established, you can make an appropriate invitation to a client without the risk of a real or perceived conflict of interest for yourself or your client.

—Jeff Cooper, Southern Regional Manager