CounselCore.ai — Pre-Deployment Assessment Checklist

Sovereign AI for Law Firms · Secure • Private • In-House · Built around attorney-client privilege

Use this one-page checklist before your firm puts any AI tool to work on client matters. It follows the New York County Lawyers Association's Opinion No. 755-2026 (November 5, 2026), which holds that a lawyer's duty here is personal and non-delegable: assess the tool before you deploy it, protect privilege and confidentiality while you use it, and verify every piece of AI-assisted work before you sign or file it. This checklist organizes your own assessment — it is not legal advice.

A. Before you deploy — assess the tool (NY Rules of Professional Conduct 1.1 and 1.6)

☐ Where does your data actually go? Does any client information leave your firm's own systems — and if so, onto whose servers?

☐ Could typing client data into this tool count as handing it to a third party? The Opinion is blunt: sensitive or unredacted client data in an unsecured, public AI tool is a voluntary disclosure that can destroy the confidentiality privilege depends on.

☐ Is your firm's data used to train the vendor's models? Get the answer in writing, not in a sales call.

☐ Who at the vendor can see your data, and under what terms? What happens to it if you cancel — how long is it kept, and is deletion guaranteed?

☐ Can you control and audit access — individual logins, permissions by role, and a record of who used the tool and when?

B. While you use it — protect privilege and confidentiality

☐ Your firm has a written rule for which AI tools are approved for client work, and which are not. Consumer chatbots are on the 'not' list.

☐ No one at the firm pastes sensitive or unredacted client information into a public AI tool — no exceptions for 'quick questions.'

☐ Clients are told, and consent where required, before AI is used on their matters.

☐ Everyone who touches the tool — partners, associates, staff — has been trained on the waiver risk, not just the features.

C. Before you sign or file — verify everything (Rule 3.3 and 22 NYCRR Part 130)

☐ The responsible attorney has read every AI-assisted draft in full — not skimmed it.

☐ Every case cited has been opened and checked. AI can invent cases, quotes, and holdings that sound real.

☐ Every fact, date, and number has been checked against the record or the source document.

☐ The signing attorney knows the stakes: under the Opinion, signing and submitting a court paper containing AI 'hallucinations' can be treated as frivolous conduct.

D. How CounselCore is built to pass this checklist

- Runs in-house, on infrastructure your firm controls — client data never leaves your walls, so there is no third-party disclosure to waive anything.
- Your data is never used to train shared models. Your matters stay your matters.
- Access is firm-controlled, with individual accounts and an audit trail.
- Nothing is filed, sent, or submitted by the system on its own — your attorneys verify and sign, the way the Opinion requires.

Prepared for your firm's review with its own counsel. CounselCore.ai · info@counselcore.ai · (908) 795-8377 · Request a confidential briefing at counselcore.ai

Approved for distribution by CounselCore: Timothy Connolly, President & CEO Date: November 12, 2026