MERIDIAN LEADERSHIP CONSULTING LLC

Code of Ethics

Know yourself. Lead better. Build something that lasts.

PURPOSE

This Code of Ethics describes the standards that govern how Meridian Leadership Consulting conducts its work: with clients, with the leaders they bring into our programs, and with the wider community we serve. It is the standard we hold ourselves to before any client asks us to. It is the standard we invite our clients to hold us to.

The Code is not a marketing document. It is a working commitment. It exists because leadership development is intimate work, conducted under conditions of trust, and because the leaders we serve deserve to know exactly what we are accountable to before they begin the work.

Meridian draws on the established ethical traditions of the coaching and leadership development profession: in particular, the standards reflected in the Global Code of Ethics for Coaches, Mentors and Supervisors and the Code of Ethics of the International Coaching Federation. While Meridian is not currently a credentialed member of either body, our practice is consistent with the standards both codes describe, and we maintain that consistency as a deliberate choice rather than an external requirement.

CORE COMMITMENTS

Five commitments anchor everything else in this Code. They are not aspirations. They are the standard.

Honesty

We represent our work, our credentials, and our experience honestly. We do not overstate what Meridian has done, who has worked with us, or what the methodology has been independently validated to do. Where the work is new, we say so. Where the credentials are in progress, we say so. Where the science is settled, we cite it; where it is emerging, we frame it that way.

Confidentiality

What is said in the room stays in the room. The exceptions are narrow, named in writing before the engagement begins, and explained to the client in the first session. The confidentiality of the coaching relationship is not negotiable for marketing convenience, client recognition, or organizational pressure.

Competence

We work only within the boundaries of what we are genuinely qualified to deliver. We refer clients to other practitioners (therapists, financial advisors, medical professionals, specialized coaches) when the work crosses the line out of leadership development and into territory we are not the right people to serve. We do not stretch the work to keep an engagement; we shape the engagement to fit the work.

The Client's Interest First

Every decision in an engagement is measured against the client's genuine interest, not Meridian's commercial interest. If the right move for the client is to end the engagement, we end it. If the right move is to recommend a different practitioner, we recommend them. If the right move is to slow down when speed would benefit our business, we slow down. The client comes first.

Owning Our Patterns

The work Meridian does with leaders (helping them see patterns that have shaped how they lead) we do on ourselves. We participate in our own reflective practice. We seek feedback. We name the patterns we are running, in our work and in our business. The standard we hold our clients to is the standard we hold ourselves to first.

> **OUR STANDARD**
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> *We hold ourselves to the standard we hold our clients to. The standard does not arrive in the room with the client. It is already there.*

STANDARDS OF PRACTICE

1. WORKING WITH CLIENTS

1.1 Engagement Agreements

1.1.1 Every Meridian engagement (cohort training, executive coaching, or culture consulting) begins with a written agreement that names the scope, the duration, the financial terms, the confidentiality terms, and the conditions under which either party may end the engagement.

1.1.2 We make this Code available to every client before the engagement begins. We explain our commitment to abide by it. We make clear that the client is entitled to raise any concern about our adherence to it at any point in our work together.

1.1.3 We are transparent about our methods. If a client asks how the work is structured, what frameworks we use, or why a particular session is designed the way it is, we answer plainly.

1.2 Confidentiality

1.2.1 We maintain the strictest level of confidentiality with all client information shared in coaching sessions, cohort settings, or organizational engagements. We do not disclose what a client said, did,

struggled with, or worked through to anyone outside the engagement: including other clients, prospective clients, marketing audiences, or social media.

1.2.2 The exceptions to confidentiality are narrow and named in writing at the start of every engagement. They include: a credible risk of imminent harm to the client or others, legal compulsion, and, in organizational engagements, the specific information the engagement agreement permits us to share with the sponsoring organization.

1.2.3 In organizational engagements where the company is paying for a coaching engagement, we are explicit with the client about what we will share with the sponsor and what we will not. The default is that themes may be shared in aggregate; the content of specific sessions is not.

1.2.4 We store all client records (written notes, session recordings if any, electronic communications, contracts) securely, in a password-protected account that only Meridian can access. Session notes are kept for three years after the engagement ends and then securely deleted, unless the client asks for earlier deletion in writing; financial records are kept as long as tax law requires.

1.2.5 We do not use a client's name, role, organization, or identifying engagement details in any marketing material without explicit written permission. Where a client agrees to be quoted or named, the specific text is shown to them and approved in writing before publication.

1.3 Boundaries and the Coaching Relationship

1.3.1 We maintain clear professional boundaries with every client. We do not enter into romantic, sexual, or financial relationships with current clients or sponsors that exist outside the engagement itself.

1.3.2 Where a personal relationship pre-exists a potential coaching engagement (a friend, a former colleague, a family connection) we evaluate honestly whether the pre-existing relationship is compatible with the coaching work. In some cases the answer is no. When it is no, we say so and recommend the prospective client to another practitioner.

1.3.3 We are aware of the power dynamic that exists between coach and client and we manage that dynamic deliberately. We do not exploit it for financial, social, or personal advantage.

1.4 Conflicts of Interest

1.4.1 We disclose any actual or potential conflict of interest to a prospective client before an engagement begins. This includes existing relationships with the client's organization, prior engagements with their direct reports or managers, financial interests that could be affected by the engagement, and any other circumstance a reasonable client would want to know.

1.4.2 Where a conflict of interest emerges during an engagement, we name it immediately. If the conflict can be managed transparently with the client's informed consent, we proceed. If it cannot be managed without compromising the client's interest, we end the engagement and refer the client elsewhere.

1.4.3 In cohort engagements, we are alert to conflicts among participants (for example, a manager and a direct report attending the same Ascent cohort) and address them in the engagement design before the cohort begins, not during it.

1.5 Ending the Engagement

1.5.1 A client may end any Meridian engagement at any time, with or without cause, subject to the financial terms of the engagement agreement.

1.5.2 If we believe a client would be better served by a different practitioner or a different form of professional help (therapy, medical care, a coach with specialized expertise we do not have) we say so and help them find that practitioner.

1.5.3 Our responsibilities to a client continue beyond the end of the engagement. We maintain confidentiality of everything shared during the engagement indefinitely. We do not contact former clients to upsell additional services. We do not use the former relationship to gain any subsequent advantage.

1.6 Technology and AI

1.6.1 Our ethical and legal obligations apply directly and through any technology we use, including scheduling and video platforms, transcription, databases, software, and artificial intelligence.

1.6.2 We tell clients in writing which technology touches their information, who can access it, how long it is kept, and how it is used. Meridian does not put identifiable client material into AI tools. If that ever changes, we will ask for the client's explicit written consent first, and the client may decline without affecting the engagement.

1.7 Multiple Roles

1.7.1 Meridian may act in more than one role with the same organization or person: as coach, cohort facilitator, consultant to the sponsoring organization, or certifier. We name each role at the start of an engagement and whenever it changes, explain how confidentiality applies in each, and never carry coaching content into another role.

2. PROFESSIONAL CONDUCT

2.1 Honest Representation

2.1.1 We represent our qualifications, training, experience, and methodology accurately in every published material, every conversation, and every proposal. Where credentials are in progress, we say so. Where Meridian is new, we are direct about it rather than implying years of practice.

2.1.2 We do not claim membership in or accreditation by any professional body we have not actually joined. Where we draw on the standards of bodies like the ICF or the EMCC, we describe that influence accurately as influence, not as membership.

2.1.3 We attribute ideas, frameworks, and research to their originators. Where Meridian has built proprietary frameworks (the Three Ropes™, Sequence-Based Behavioral Design™, the Sherpa model)

we mark them as such. Where we draw on the work of others (for example Edmondson, Gollwitzer and Sheeran, Lieberman, and the wider body of learning-science, psychology and neuroscience research our materials cite), we cite them.

2.2 Reputation of the Profession

2.2.1 We conduct ourselves in ways that reflect positively on the broader leadership development and coaching profession, recognizing that the public's trust in our work depends on the integrity of every practitioner in it.

2.2.2 We treat other practitioners (coaches, consultants, trainers, leadership educators) with the same respect we ask for ourselves. We do not disparage colleagues to win business. Where we believe another practitioner is acting unethically, we address the concern with them directly before raising it elsewhere.

2.3 Equity, Diversity, and Inclusion

2.3.1 We work with leaders across difference (of background, race, ethnicity, gender, sexual orientation, age, religion, ability, and neurodiversity) and we recognize that our own perspective is shaped by who we are and where we come from. We do not assume our experience is universal.

2.3.2 We engage in ongoing reflection on our own biases, conscious and unconscious. We seek feedback. We adjust how we work when we learn that something we have been doing is not landing for the leader in front of us.

2.3.3 We do not knowingly discriminate against any client, participant, or colleague on any basis. We do not tolerate discriminatory behavior in our cohorts or coaching engagements; where it occurs, we address it directly.

2.4 Legal and Statutory Obligations

2.4.1 We operate in compliance with all applicable laws, including those governing business operations, data protection, intellectual property, employment, and tax.

2.4.2 Before any client engagement begins, we carry professional liability insurance covering the coaching, consulting, and training work we conduct.

2.4.3 Where our work takes us into organizations with their own policies governing leadership development, coaching, or external consulting, we operate within those policies.

3. EXCELLENT PRACTICE

3.1 Ability to Perform

3.1.1 We work only within the limits of our genuine competence. The skills required to coach an experienced executive are not identical to the skills required to facilitate a Base Camp cohort, which are not identical to the skills required to consult on organizational culture. We do not pretend otherwise.

3.1.2 Where a client's needs exceed what we are competent to deliver, we say so and refer them to a more experienced or differently qualified practitioner.

3.1.3 We do not practice when we are not fit to practice. If health, personal circumstance, or any other condition compromises our ability to be present and effective in the work, we pause it, reschedule, or transition the client to a qualified colleague.

3.2 Reflective Practice and Continued Development

3.2.1 We commit to our own reflective practice (peer consultation, formal supervision, or equivalent structured reflection) at a frequency appropriate to the work we are doing. The leaders we serve deserve a practitioner who is doing the work on themselves, not only on others.

3.2.2 We pursue continuing professional development. We read. We learn. We refine the methodology in response to what the work actually produces, not what is comfortable to believe about it.

3.2.3 We discuss ethical dilemmas with trusted peers or supervisors before acting on them. Where we are uncertain about the right course of action, we seek consultation rather than improvise.

3.3 Quality and Feedback

3.3.1 We systematically evaluate the quality of our work through structured feedback from clients, participants, and peers. We act on what we learn.

3.3.2 We acknowledge mistakes when we make them, repair what we can repair, and adjust the practice to prevent recurrence. The standard is not perfection; the standard is honesty and accountability when we fall short.

CONCERNS AND ACCOUNTABILITY

Any client, participant, sponsor, or colleague who believes Meridian has acted inconsistently with this Code is invited to raise the concern directly with Caleb Shuey, Founder, at the contact information below. We commit to acknowledging any such concern within five business days, engaging with it seriously, and responding substantively within thirty days.

Where a concern cannot be resolved through direct conversation, the complainant is welcome to seek consultation from professional bodies in the leadership development and coaching field, including the International Coaching Federation and the European Mentoring and Coaching Council. Meridian will cooperate fully with any such review.

APPLICATION AND REVIEW

This Code applies to all work conducted under the Meridian Leadership Consulting name: by the founder, by any future facilitators or coaches operating under Meridian engagement, and by any subcontractor or partner engaged in Meridian work.

This Code is reviewed annually and updated as the practice grows, as the profession evolves, and as our understanding of what excellent ethical practice requires deepens. Current version: 1.1, November 2026. Contact: Caleb Shuey, Founder, caleb.shuey@meridianleaders.com.