

# Corporate Compliance Forms and Tools

## Post-Merger/Acquisition Compliance and Ethics Program Integration Checklist

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When developing a post-merger/acquisition compliance and ethics program integration plan, the top priority is getting everyone on the same page. The acquirer's ethics and compliance program needs to be implemented throughout the newly acquired entity in a timely and effective manner. The integration must also be carefully documented. This sample integration checklist will help provide a simple method for doing both.

**PURPOSE:** To educate the employees of the newly acquired business about the ethics and compliance expectations of the acquiring organization, including its standards, policies, processes, and guidelines.

**INSTRUCTIONS:** The integration manager assigned to the transaction will work with the chief compliance officer or their designee to ensure the actions listed below are completed within the targeted timelines. Please note this ethics and compliance integration process may take more or fewer than 120 days depending on the specific circumstances of the transaction. While the specific integration plan for your organization may vary, the following tasks may be important to consider.

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