TEMPLATE

AI agent spend policy, *[Company]*

01 Purpose and scope

This policy covers AI agents that [Company] runs to pay for goods, services, and API usage.

In Conto: one workspace for the company.

02 Roles

Budget holder	[name, title]
Policy administrators	[names]
Approvers	[roles or names]
Agent owners	[listed in the agent register]

In Conto: Owner and Admin edit policy. Managers can tighten their team's rules. Owner, Admin, and Manager can approve.

03 Company-wide rules

Blocked suppliers	[list]
Blocked categories	[list]
Maximum single payment	[$]
Allowed payment methods	[list]
Hours	[window]

In Conto: organization-scope policies. Payment methods: the wallets and cards linked to each agent, not a policy rule.

04 Agent register

One row per agent.

AGENT	TEAM	PURPOSE	OWNER	MONTHLY LIMIT	PER-PAYMENT LIMIT	REVIEW LINE	APPROVED SUPPLIERS	PAYMENT METHOD

In Conto: agent-assigned policies, and the wallets and cards linked to the agent.

05 Approval matrix

One row per tier.

AMOUNT TIER OR CONDITION	APPROVER	APPROVALS REQUIRED	EXPIRES AFTER	ESCALATES TO

In Conto: approval workflows (wallet payments).

06 Budget requests

Who may approve an agent's budget request, and the maximum amount [ ]

In Conto: budget requests.

07 Changing this policy

Who may change rules [ ]

Review cadence [monthly or quarterly]

In Conto: policy version history.

08 Records and review

Export payment records and the audit log every [period]

Reviewer [ ]

In Conto: exports, audit log.