



**Please Complete, Sign and Fax to 1-866-275-1213 or  
Email to Taylor@CareerInsuranceAgents.com**

This non-disclosure agreement (Agreement) is between Career Insurance Agents, (CIA) and  
Trey Bowman \_\_\_\_\_ (Prospect). Whereas CIA and Prospect wish to exchange certain  
information pertaining to the operations and contractual obligations of CIA and its independent contractors, these  
two parties hereby agree to the following conditions:

1. CIA will provide Prospect with an original copy "Draft" of its standard Agency/Agent contract (contract). In addition, CIA will provide Prospect with additional information, both orally and in writing, as to the operations and benefits of becoming an Independent Contractor with CIA.
2. Prospect agrees not to share this information with any third parties not explicitly approved by CIA and to use reasonable and practical care to protect and maintain possession of the contract and any other materials provided to Prospect by CIA. This applies not only to all original documents, but to all copies that may have been made by or supplied to Prospect.
3. Upon request of CIA, Prospect will return all documents, materials, and notes both originals and copies to CIA within 15 days of the request.
4. In the event of a breach or threatened breach of this Agreement, CIA shall be entitled to preliminary and final injunctions, in addition to any other rights and remedies available to it at law or in equity.
5. The validity and performance of this contract are governed by the laws of the State of Colorado.
6. This Agreement is binding upon the directors, officers, employees and agents of each party and will continue indefinitely, with the obligations of confidentiality surviving the termination of this Agreement.

**Career Insurance Agents:**

**Prospect:**

Print Name \_\_\_\_\_

Print Name Trey Bowman \_\_\_\_\_

Signature \_\_\_\_\_

Signature  \_\_\_\_\_  
15D01D35C1E547C...

Title \_\_\_\_\_

Title Owner \_\_\_\_\_

Date \_\_\_\_\_

Date 7/9/2020 \_\_\_\_\_

Career Insurance Agents Prospective Agent Questionnaire

**\*All Information is held in strictest confidence.**

Please complete the information below and either Fax to: 1-866-275-1213 or  
Email to Taylor@CareerInsuranceAgents.com

How did you hear about CIA:

1. **Contact Information:** **Date:**  
7/9/2020  
 Name: Trey Bowman  
 Address: 229 Colt Dr  
 City: Waxahachie State: TX Zip Code: 75165  
 Office PH: 9729387634 Cell PH: 2144337488 Fax: 9729377635  
 Preferred Email: golferguy1980@gmail.com
  
2. **Planned Business Location:** *(retail, office space, suite, home based)* Office Space
  
3. **Tell us about your background:** *(Insurance, Financial, Tax Prep., what you did before...)*  
Insurance 14 years
  
4. **Describe Your Present Situation:** *(Captive or Independent Agency...Motivation for exploring options?)*  
Captive Agent; better opportunities for more carriers
  
5. **What are Your Most Important Needs:**  
Solid carrier products, solid training and solid marketing plans
  
6. **Please describe your typical Customer Profile:** *(Preferred PL, Non-Standard PL, or Commercial – what segments...?)* Preferred PL and some Commercial
  
7. **What is Your Timeline in Making a Decision:** within a few months
  
8. **Present Agency Information:**  
Written Premium Volume: 3.6 million  
PL% vs. CL% Split: 99% PL 1% CL (current carrier does not have much options on CL)  
Lead Carrier(s): Allstate
  
9. **Plans going forward:**  
Estimated Premium Year 1, 2, 3: 1 million, 2 million, 3 million  
Estimated Commission Income Year 1, 2, 3: 150k plus, 300k plus, 500k plus  
 Primary Sales Initiatives:  
Very sales focused, currently with 1 carrier I am personally selling 70 to 100 items per month with translates to 60k to 90k per month. I think i can do more with more options. sky is the limit from what I can see.
  
10. **Additional Information:** e.g., non-completes, previous criminal convictions, carrier terminations, bankruptcy, etc...  
1 year no compete with current carrier, no other things that would hold me back.