



**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  
Jeremy Davis \_\_\_\_\_ (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 Jeremy Davis \_\_\_\_\_

Signature \_\_\_\_\_

Signature  \_\_\_\_\_  
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Title \_\_\_\_\_

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

Date \_\_\_\_\_

Date 7/13/2020 \_\_\_\_\_

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:**  
7/13/2020  
Name: Jeremy Davis  
Address: 2950 Sourek Rd  
City: Akron State: Ohio Zip Code: 44333  
Office PH: 3306681331 Cell PH: 3306122401 Fax: 3306681331  
Preferred Email: jeremy@atlasoneinsurance.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...)*  
Former State Farm agent and current owner of independent agency
  
4. **Describe Your Present Situation:** *(Captive or Independent Agency...Motivation for exploring options?)*  
Independent and looking for a better partnership with aggregator
  
5. **What are Your Most Important Needs:**  
Training, technology and overall growth mindset
  
6. **Please describe your typical Customer Profile:** *(Preferred PL, Non-Standard PL, or Commercial – what segments...?)* Preferred PL and commercial
  
7. **What is Your Timeline in Making a Decision:** 3 months
  
8. **Present Agency Information:**  
Written Premium Volume: 150000  
PL% vs. CL% Split: 11.5% for both  
Lead Carrier(s): Travelers, Safeco, Progressive and Grange
  
9. **Plans going forward:**  
Estimated Premium Year 1, 2, 3: \$600k, 1.2M, 1.8M  
Estimated Commission Income Year 1, 2, 3: \$72k, \$140k, \$210k  
Primary Sales Initiatives:  
Referral partnerships
  
10. **Additional Information:** e.g., non-completes, previous criminal convictions, carrier terminations, bankruptcy, etc...  
Current aggregator has a non-compete that they've agreed to waive.