

CIA Prospective Agent Non-Disclosure

This non-disclosure agreement is between Career Insurance Agents (CIA) and Prospective Agent of this agreement. Whereas CIA and Prospective Agent 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 Prospective Agent with an original copy "Draft" of its standard Agency/Agent contract. In addition, CIA will provide Prospective Agent with additional information, both orally and in writing, as to the operations and benefits of becoming an Independent Contractor with CIA.
 2. Prospective Agent 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, Prospective Agent 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.
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Contact Information**Name *** Katie Trump**Phone Number *** (540) 392-5001**Email *** katie@homesteadcoverage.com**Address *** 
2915 Mud Pike
Christiansburg, VA 24073
United States**Planned Business Location (retail, office space, suite, home based) *** either office space or home based**Tell us about your background (Insurance, Financial, Tax Prep., what you did before) *** I have been in insurance for 7 years, prior to that I worked in sales within the senior medical industry.**Describe Your Present Situation and What has you exploring new opportunity? (Captive or Independent Agency) Motivation for exploring options? *** I was a captive agent for most of my career, I was frustrated by the very restrictive compliance and underwriting guidelines. I constantly felt like my hands were tied but I really enjoyed the team atmosphere. I am a competitive person and have missed that part of being captive and I think that they hybrid model offered through CIA would be a good fit for me.**Please describe your typical Customer Profile** Commercial Lines**What are your most important needs? *** agency organization and competition, prospecting in an intentional way**What is Your Timeline in Making a Decision: *** I need to do something by the end of q3

Present Agency Information:

Current Written Premium? (Captive/Independent) *	525000
PL%- VS - CL% ratio: *	40/60
Lead Carrier(s): *	this was with Farm Bureau - I have the majority of my book with Foremost at this time
Plans going forward:	
Estimated Premium Year 1, 2, 3: *	250000,400000,500000
Estimated Commission Income Year 1, 2, 3: *	50000,80000,100000
Primary Sales Initiatives: *	one of my largest referral partners has given me access to his property management database. He has just over 400 properties, 180 owners and close to 1000 tenants that I need to sell and cross sell.
Additional Information: non-completes, previous criminal convictions, carrier terminations, bankruptcy, etcâ€¦! *	I had a bankruptcy in 2019 (discharged August 2019) due to extreme medical bills from a complex medical history
Date Signed: *	Tuesday, August 4, 2020

DocuSigned by:

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