

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.
-
-

Contact Information

Name * Joey Sword

Phone Number * (615) 423-9085

Email * jtsword85@yahoo.com

Address * 
105 Ashford Court
Hendersonville, Tennessee 37075
United States

Planned Business Location (retail, office space, suite, home based) * Office or home based

Tell us about your background (Insurance, Financial, Tax Prep., what you did before) * Current Allstate Agent

Describe Your Present Situation and What has you exploring new opportunity? (Captive or Independent Agency) Motivation for exploring options?) * Been with Allstate my entire 4 years in insurance with almost 2 as an agent. There has been changes made by Allstate since I have become an agent that is making me question my future relationship with them. Decisions are being made that are impacting agency owners with no other options to help their business. I would like to have more of that control over my own business.


Please describe your typical Customer Profile Personal Lines

What are your most important needs? * I would like to be able to offer more competitive rates with great companies to those in my community.

What is Your Timeline in Making a Decision: * If I make the change, it would be 6 months.

Present Agency Information:

Current Written Premium? (Captive/Independent) *	1,470,023
PL%- VS - CL% ratio: *	95% PL 5% CL
Lead Carrier(s): *	Allstate
Plans going forward:	
Estimated Premium Year 1, 2, 3: *	\$400k, \$600k, \$850k
Estimated Commission Income Year 1, 2, 3: *	\$60k, \$90k, \$125k
Primary Sales Initiatives: *	Continued relationship building with LOs and realtors. Build new brand within the community and social media. Targeted ads via Facebook integrated with chat bots..
Additional Information: non-completes, previous criminal convictions, carrier terminations, bankruptcy, etcâ€¦ *	One year non-compete with Allstate
Date Signed: *	Thursday, September 3, 2020

DocuSigned by:

22A67EF20FD54CC...