


## 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

<b>Name *</b>	Shala Crabtree
<b>Phone Number *</b>	(252) 245-4525
<b>Email *</b>	<a href="mailto:shala.campbell@yahoo.com">shala.campbell@yahoo.com</a>
<b>Address *</b>	 6760 Reedy Branch Rd Rocky Mount , NC 27803 United States
<b>Planned Business Location (retail, office space, suite, home based) *</b>	Home based
<b>Tell us about your background (Insurance, Financial, Tax Prep., what you did before) *</b>	Licensed Insurance Agent for 14 years
<b>Describe Your Present Situation and What has you exploring new opportunity? (Captive or Independent Agency) Motivation for exploring options?) *</b>	I worked for a captive Agent for 12 years prior to her retirement running the agencies day to day operations as the office manager including all sales for the agency. We were merged/ purchased twice back to back within 2 years. With all the change, our carrier also went from captive to independent. This prompted for a change as I was approached by another agency in the same town during that time. I've been with his agency since January. This doesn't seem to be a fit.
<b>Please describe your typical Customer Profile</b>	Personal Lines
<b>What are your most important needs? *</b>	The have a solid carriers to move my book of business to.
<b>What is Your Timeline in Making a Decision: *</b>	September 2020

Present Agency Information:

<b>Current Written Premium? (Captive/Independent) *</b>	20,000 a month (July 1st went from captive to independent)
<b>PL%- VS - CL% ratio: *</b>	100% PL
<b>Lead Carrier(s): *</b>	Nationwide, National General and Universal Property

Plans going forward:

<b>Estimated Premium Year 1, 2, 3: *</b>	Year 1, 200,000, Year 2 300,000, Year 3 400,000
<b>Estimated Commission Income Year 1, 2, 3: *</b>	30,000, 40,000, 50,000
<b>Primary Sales Initiatives: *</b>	Referrals
<b>Additional Information: non- completes, previous criminal convictions, carrier terminations, bankruptcy, etcâ€¦; *</b>	Non-complete with former agency to not solicit business until 3/2021
<b>Date Signed: *</b>	Tuesday, July 28, 2020

DocuSigned by:  
  
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