


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 *	Wendy Daniels
Phone Number *	(614) 557-4409
Email *	wendyjcover@gmail.com
Address *	 4648 Kenneth Joseph Ct Morrow, OH 45152 United States
Planned Business Location (retail, office space, suite, home based) *	Office Space
Tell us about your background (Insurance, Financial, Tax Prep., what you did before) *	15 years in banking, 1 year captive agency owner (current)
Describe Your Present Situation and What has you exploring new opportunity? (Captive or Independent Agency) Motivation for exploring options?) *	Currently Captive Allstate Agent. It's been 1 year in the industry and I have determined my future is Independent. I need more options for my clients, and to build my own brand vs riding the corporate roller coaster.
Please describe your typical Customer Profile	Personal Lines
What are your most important needs? *	Pay the bills and have freedom to run my business
What is Your Timeline in Making a Decision: *	Preferably 2-6 months
Present Agency Information:	
Current Written Premium? (Captive/Independent) *	328000 since October 2019

PL%- VS - CL% ratio: *	80% purchased leads - 20% Close ratio
Lead Carrier(s): *	Allstate
Plans going forward:	
Estimated Premium Year 1, 2, 3: *	Minimum \$500k per year growth
Estimated Commission Income Year 1, 2, 3: *	240k each year total agency income
Primary Sales Initiatives: *	Currently replying on live transfer calls; trying to implement CAC strategies to move away from purchased leads
Additional Information: non-completes, previous criminal convictions, carrier terminations, bankruptcy, etcâ€¦ *	Clean background and credit, Non-compete with Allstate for 1 year when I leave
Date Signed: *	Wednesday, August 19, 2020

DocuSigned by:

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