


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 *	Aimee Mattson-Kerner
Phone Number *	(971) 777-3445
Email *	aimee@cedarbenefitsolutions.com
Address *	 20270 SW. Monson St. Aloha, Oregon 97003 United States
Planned Business Location (retail, office space, suite, home based) *	Home based
Tell us about your background (Insurance, Financial, Tax Prep., what you did before) *	Insurance, Corporate Recruiter, Insurance
Describe Your Present Situation and What has you exploring new opportunity? (Captive or Independent Agency) Motivation for exploring options?) *	<p>I am an independent insurance broker. I worked as a captive agent years ago for Farmers. I now own my own brokerage where I currently offer mortgage protection and life insurance. I am expanding my product line to add health and Meidcare Supp and Advantage, as well as property & Casualty.</p> <p>My goal is to be able to offer as many products under one roof to my clients.</p>
Please describe your typical Customer Profile	Personal Lines
What are your most important needs? *	Auto/Home
What is Your Timeline in Making a Decision: *	Immediately

Present Agency Information:

Current Written Premium? (Captive/Independent) *	None – Wanting to start
PL%- VS – CL% ratio: *	None
Lead Carrier(s): *	None
Plans going forward:	
Estimated Premium Year 1, 2, 3: *	1st year – 50,000 but not entirely sure
Estimated Commission Income Year 1, 2, 3: *	1st year – \$60,000
Primary Sales Initiatives: *	Client building and referrals as well as networking
Additional Information: non-completes, previous criminal convictions, carrier terminations, bankruptcy, etcâ€¦ *	Bankruptcy in 2012, no criminal activity, no terminations
Date Signed: *	Thursday, October 8, 2020

DocuSigned by:

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