

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 * Sarah Gourley

Phone Number * (219) 730-8102

Email * sgourley@live.com

Address * 
 1041 State St
 Hobart, Indiana 46342
 United States

Planned Business Office space

Location (retail, office space, suite, home based) *

Tell us about your background (Insurance, Financial, Tax Prep., what you did before) * Insurance 16 years

Describe Your Present Situation and What has you exploring new opportunity? (Captive or Independent Agency) Motivation for exploring options?) *

Captive with Shelter Insurance. Ability to write with a few other carriers and through our broker. I worked for an IA prior to having a Shelter agency. At the time, I wanted to be my own boss but didn't have money to open an IA myself. Shelter provided a place I could work for myself. That said, I'd prefer to have an IA so I could make real money and actually work for myself. At this point, I'm just looking for more info on CIA. What benefits would be compared to my current situation? Would starting over really be worthwhile? What's the cost of CIA vs trying to open on my own? I have signed a non-compete with Shelter but have a three year lease here. Would I be able to stay? Just collecting info.

Please describe your typical Customer Profile Personal Lines

What are your most important needs? * Freedom and financial security

What is Your Timeline in Making a Decision: Just collecting more information at this time.
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Present Agency Information:

Current Written Premium? (Captive/Independent) * Captive \$250000

PL%- VS - CL% ratio: * 95% 5%

Lead Carrier(s): * Shelter Insurance

Plans going forward:

Estimated Premium Year 1, 2, 3: * With captive, \$400,000 \$600000. \$800000

Estimated Commission Income Year 1, 2, 3: * Life& PC 80,000 85000. 90,000

Primary Sales Initiatives: * Implementing systems that sell on value, not premium

Additional Information: non-completes, previous criminal convictions, Non-competes

carrier terminations,
bankruptcy, etc. *

Date Signed: * Friday, August 21, 2020

DocuSigned by:
Sarah Gowley
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