

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 * Eric Wanta

Phone Number * (608) 469-1046

Email * thewantaagency@gmail.com

Address * 
930 Falcon Dr
River Falls, WI 54022
United States

Planned Business Home based/office space
Location (retail, office space, suite, home based) *

Tell us about your background (Insurance, Financial, Tax Prep., what you did before) * Casual Insurance agent, paramedic of 10 years

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

Honestly, I want to create a business that can help support a local rural ambulance service. The government ambulance service that I work for wants to dissolve because they believe that they can't afford to provide the service. The demand for ambulance services is infrequent, and with a little bit of an innovative staffing model, could allow us to respond to ambulance calls, and still provide great customer service on the insurance front. I believe that the community knowing that we are providing ambulance services could also be an excellent referral mechanism.

I spent 6 months with Farmers Insurance in 2018 in an agent pathway, and did not believe captive was the right fit.

I recently signed up as a 1099 for an independent agency, but find that I am limited in what I can do in a multitude of ways (automation, advertising, etc.) by my contract with owner. I also don't own my book of business. My contract doesn't reward me by producing more aside from the same commission level and an unwritten possibility of being able to buy an ownership stake, even though I know selling more will impact the principal's bonuses.

I explored some options to find ambulance service insurance companies for WC and Prop/Casualty and sought out appointments, but my share of the revenue won't change.

I don't think I will be happy and motivated unless I am the owner and can build systems of business that I think work. As I signed up for CAC and paid for it on my own, I figured I would see what CIA was about to see if it was a better option for me and my vision of the future.

I know that I need to put a lot more effort in that I have so far to be successful; and I will appreciate your honest feedback, pick holes in my thoughts and plans. What would you need to see from me to believe that this was the right fit? I have accomplished what I have while working 56 hours a week as a paramedic and managing two rental properties as well.

Please describe your typical Customer Profile Commercial Lines

What are your most important needs? * Ownership and market access

What is Your Timeline in Making a Decision: Months, mostly just waiting to close a 60k premium WC policy before making my decision

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Present Agency Information:

Current Written Premium? 10000

(Captive/Independent)

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PL%- VS - CL% ratio: * 66/33 presently

Lead Carrier(s): * West Bend Mutual

Plans going forward:

Estimated Premium 700K, 1.4MM, 2.1MM?

Year 1, 2, 3: *

Estimated 60K, 120k, 180k?

Commission Income

Year 1, 2, 3: *

Primary Sales I am waiting to pull the trigger on a Facebook

Initiatives: *

Additional Information: non- Current non-compete on employees and quoted risks, 2 years from contract termination date

completes, previous criminal convictions, carrier terminations, bankruptcy, etcâ€¦ *

Date Signed: * Tuesday, September 15, 2020

DocuSigned by:

Eric Wanta

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