


## 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>	Megan Mercer
<b>Phone Number *</b>	(816) 582-6324
<b>Email *</b>	<a href="mailto:merc.megan@gmail.com">merc.megan@gmail.com</a>
<b>Address *</b>	 9111 cyclone school rd lee's summit, mo 64064 United States
<b>Planned Business Location (retail, office space, suite, home based) *</b>	office space
<b>Tell us about your background (Insurance, Financial, Tax Prep., what you did before) *</b>	20 years insurance industry – 9 years as producer, 4.5 with captive and 4.5 with current agency
<b>Describe Your Present Situation and What has you exploring new opportunity? (Captive or Independent Agency) Motivation for exploring options? *</b>	Independent Agency – would like to have better ROI on policies written (earn higher commissions) and be able to direct my marketing, process and relationships. I am hand tied to current agency procedures with inadequate support and lack of access to carriers. I'm ready to build my own empire!
<b>Please describe your typical Customer Profile</b>	Commercial Lines
<b>What are your most important needs? *</b>	Competitive Carriers, management system access
<b>What is Your Timeline in Making a Decision: *</b>	30 days or less

Present Agency Information:

<b>Current Written Premium? (Captive/Independent) *</b>	1.4M Independent
<b>PL%- VS - CL% ratio: *</b>	30% PL - 70% CL
<b>Lead Carrier(s): *</b>	EMC, MEM, Acuity, Nationwide, Hartford
Plans going forward:	
<b>Estimated Premium Year 1, 2, 3: *</b>	500k - year 1 / 500k - year 2 / 500k - year3
<b>Estimated Commission Income Year 1, 2, 3: *</b>	\$60K - year 1 / \$130K - year 2 / \$175K - year 3 ((includes renewals))
<b>Primary Sales Initiatives: *</b>	referrals from exisitng power team clients (financial advisor/payroll service/tax firm working with commercial clients)
<b>Additional Information: non-completes, previous criminal convictions, carrier terminations, bankruptcy, etcâ€¦ *</b>	3 year non compete, non solicit
<b>Date Signed: *</b>	Tuesday, October 27, 2020

DocuSigned by:  
  
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