

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

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Address * 
 2469 Motsinger Farm Ln
 Kernersville, North Carolina 27284
 United States

Planned Business Home based starting out- then office

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

Tell us about your background (Insurance, Financial, Tax Prep., what you did before) * Currently been an agent team member for 2 years, started off with one of the most successful State Farm agents in NC, and am currently working for one who just started in may. I have a background in finance as I worked for a credit union as a loan officer

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

Currently captive as an agent team member. I want something more.. I want to be able to be my own agent and make the residuals that I have made for the agents I have worked for. I wanted to start off as a captive State Farm agent through their agent aspirant program first, then once understanding how the business works and growing my assets, switch to independent. However as a State Farm agent you have to stay put. You cannot decide that in a year from now you want to move to another city. I didn't like that.. now I am hesitant in completing the agent aspirant program because I do not want to be tied down to a certain city/ state. My fiancée and I might be building house later on. I am determined to prove everyone wrong who said I couldn't do it or I wouldn't be the main provider in my household.

Please describe your typical Customer Profile Personal Lines

What are your most important needs? * Support and training. I have a lot to learn, since I have only been captive.

What is Your Timeline in Making a Decision: * It's never to late, or early to start. With the right system, it can be tomorrow.

Present Agency Information:

Current Written Premium? (Captive/Independent) * As a team member in my first year –\$150,000+

PL%– VS – CL% ratio: * Close ratio on personal lines 1st year– 14.2% on mainly internet leads

Lead Carrier(s): * State Farm

Plans going forward:

Estimated Premium Year 1, 2, 3: * 1st year– \$200,000 2nd year– \$300,000 3rd year– \$500,000

Estimated Commission Income Year 1, 2, 3: * Year 1– what I hope– \$50,000. From what I hear– \$0. 2nd year– \$75,000– \$80,000 rd year – \$120,000

Primary Sales Initiatives: * Taking advantage of all CAC has to offer, marketing myself in a local sense, building my brand as a trustworthy and For The People type of agent, long weekends, long nights, increasing productivity by having my heart into this.

Additional Information: non-completes, previous N/A

criminal convictions,
carrier terminations,
bankruptcy, etc. *

Date Signed: * Tuesday, October 27, 2020

DocuSigned by:
Robert Haugk
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