

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 * Moriah Weckhorst

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Address * 
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bixby, Oklahoma 74008
United States

Planned Business Office Space or Home Based
Location (retail, office space, suite, home based) *

Tell us about your background (Insurance, Financial, Tax Prep., what you did before) * Landman for close to 1 year/Insurance for about 2 years

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

I received my P&C/L&H license December 2019 and started working full-time at State Farm. My father has been a top producing State Farm agent for 15 years. So I have worked around insurance since I was 10 years old. I have taken advantage of learning the industry from an owner's perspective and have used my time at SF to learn the various tasks of an agent/owner. My main role in the office is Sales, but do various tasks. I have spoken in depth with independent agent colleagues about starting my own agency and their advice on how to structure. I have the resources and relationships in my area for referral business from other SF agents, mortgage lenders, online marketing. My plan is to grow past myself and develop a growing team of professional agents in Tulsa, Oklahoma.

Please describe your typical Customer Profile Personal Lines

What are your most important needs? * Innovative Interface/Resources

What is Your Timeline in Making a Decision: 3-6 months
*

Present Agency Information:

Current Written Premium? (Captive/Independent) * \$40,000 annual premium/month (Captive)

PL%- VS - CL% ratio: * 85% PL 15% CL

Lead Carrier(s): * State Farm

Plans going forward:

Estimated Premium Year 1, 2, 3: * Y1-\$360,000 NB Y2-\$600,000 NB Y3-\$840,000 NB

Estimated Commission Income Year 1, 2, 3: * Estimating using 13.5% commission rate: Y1 - \$48,600 Y2 - \$124,740 (including renewal business at 90% retention) Y3 - \$225,666 ((including renewal business at 90% retention)

Primary Sales Initiatives: * Referral business from current Captive agent colleagues, Mortgage Lender, Online Marketing, Client Referral Program

Additional Information: non-completes, previous criminal convictions, None

carrier terminations,
bankruptcy, etcâ€! *

Date Signed: * Saturday, June 5, 2021

DocuSigned by:
Moriala Weckhorst
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