


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 *	Thomas Lyon
Phone Number *	(717) 802-6117
Email *	tomlyon73@yahoo.com
Address *	 1539 Inverness Drive MECHANICSBURG, PA 17050 United States
Planned Business Location (retail, office space, suite, home based) *	Home office
Tell us about your background (Insurance, Financial, Tax Prep., what you did before) *	Insurance (P&C and life. Home and Commercial)
Describe Your Present Situation and What has you exploring new opportunity? (Captive or Independent Agency) Motivation for exploring options?) *	<p>I am currently a captive agent. Over the past year me (and half of my team) are falling short of placement standards. I have exceeded my life sales by close to 3x, but my P&C numbers are falling short.</p> <p>I believe my company will not make exceptions to missing these limits, despite the current pandemic. I don't know if I will get to the limit this month.</p> <p>I am a multi-line agent. Commercial, Personal and Life.</p>
Please describe your typical Customer Profile	Personal Lines
What are your most important needs? *	Have options to write different businesses and be competitive with personal lines (with quality companies)

What is Your Timeline in Making a Decision: * Next few weeks

Present Agency Information:

Current Written Premium? (Captive/Independent) * \$250,000 P&C book

PL%- VS - CL% ratio: * Loss ration is 3%.

Lead Carrier(s): * American National

Plans going forward:

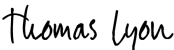
Estimated Premium Year 1, 2, 3: * 1. \$150K, 2. \$250K 3. \$350K

Estimated Commission Income Year 1, 2, 3: * 1. \$40K 2. \$55K 3. \$70K

Primary Sales Initiatives: * I mostly work with farms, but would like to have multiple commercial lines

Additional Information: non-completes, previous criminal convictions, carrier terminations, bankruptcy, etcâ€¦ * Good financial standing. No criminal record. Don't think non-compete exists

Date Signed: * Monday, December 7, 2020

DocuSigned by:

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