

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 * Ron Batey

Phone Number * (580) 235-5962

Email * ron.batey@gmail.com

Address * 
1003 Cradduck Rd. Ste. B
Ada, Oklahoma 74820
United States

Planned Business Location (retail, office space, suite, home based) * Retail office on Main Street.

Tell us about your background (Insurance, Financial, Tax Prep., what you did before) * I've been a Farmers Agent for 10 years.

Describe Your Present Situation and What has you exploring new opportunity? (Captive or Independent Agency) Motivation for exploring options? * I'm currently a Farmers agent who is looking to move out of the captive realm. We've spoken in the past, and I haven't been able to put the pieces together to make something like this work; I believe that I've got that figured out. I'm looking for a way to build up something that I will actually own and have the ability to write more business through carriers who are actually interested in writing business.

Please describe your typical Customer Profile Personal Lines

What are your most important needs? * Access to carriers that actually want to write business.

What is Your Timeline in Making a Decision: * We'd like to be ready to go by the first of 2021.

Present Agency Information:

Current Written Premium? (Captive/Independent) *	\$1,505,000 – Farmers captive
PL%- VS – CL% ratio: *	90/10
Lead Carrier(s): *	Farmers, Foremost, Bristol West
Plans going forward:	
Estimated Premium Year 1, 2, 3: *	Yr 1 = \$750k; Yr 2 = \$1.5 million; Yr 3 = \$2 million
Estimated Commission Income Year 1, 2, 3: *	Yr 1 = \$75k; Yr 2 = \$150k; Yr 3 = \$200k (I'm basing this all on 10% commission which I assume is a low average.)
Primary Sales Initiatives: *	My plan is to do what the other agencies in my area don't do; market using FB and automate my systems. We'll work smarter to "chase" and contact our prospects/clients than any of the others in my area. Referral partner networking.
Additional Information: non-completes, previous criminal convictions, carrier terminations, bankruptcy, etcâ€¦ *	I'll have a non solicit with Farmers, but I've never had any criminal issues, no bankruptcy, or anything else. My license is in good standing in OK, TX, and AR.
Date Signed: *	Tuesday, December 1, 2020

DocuSigned by:

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