

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 * Adam Behr

Phone Number * (208) 497-8269

Email * behr.adam00@gmail.com

Address * 
1607 Halsey Street
Idaho Falls, Idaho 83401
United States

Planned Business Office Space

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

Tell us about your background (Insurance, Financial, Tax Prep., what you did before€) * Last 3 years as an insurance producer, 5 years previous as a high school physics teacher, previous 8 years managing a local restaurant.

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

I'm currently with an independent agency. I'm exploring going out on my own because I've always wanted to be my own boss and actually own something, the current contract I have is too restrictive on the type/size of business I am allowed to work with, and the company culture just isn't something that I am accustomed to (recent transplant from NJ to ID).

There is a lot of opportunity that I come across that I am unable to entertain because of size or type, which I would like to change. The last three years have been great and I have focused mainly on P&C in the construction industry, but I would like to open up to personal lines (home, auto, life) as well.

The biggest motivator for me exploring other options is to secure a future for family. I want to be able to provide stability in uncertain times for those that matter most.

Please describe your typical Customer Profile Commercial Lines

What are your most important needs? * Having access to a multitude of markets and having support in the beginning stages of opening business.

What is Your Timeline in Making a Decision: Feb. 10 2021 at the latest
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Present Agency Information:

Current Written Premium? (Captive/Independent) * \$80,000 current agency, \$500,000 previous agency

PL%- VS - CL% ratio: * 100% Commercial Lines

Lead Carrier(s): * UFG, EMC, Selective, LM

Plans going forward:

Estimated Premium Year 1, 2, 3: * 500k, 950k, 2.4M

Estimated Commission Income Year 1, 2, 3: * 50k, 95k, 234k

Primary Sales Initiatives: * Each producer on staff (just me for the first two years) will utilize cold calling, direct mail, and email campaigns to bring on new business. I can provide fully detailed business plan upon request.

Additional Information: non-completes, previous criminal convictions, carrier terminations, bankruptcy, etcâ€¦ *

Have non-compete that only mentions solicitation of current clients.

Date Signed: *

Wednesday, December 2, 2020

DocuSigned by:
Adam Beler
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