


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 *	Jack McClelland
Phone Number *	(910) 691-8686
Email *	jackmcclelland.insurance@gmail.com
Address *	 PO Box 4533 Pinehurst, NC 28374 United States
Planned Business Location (retail, office space, suite, home based) *	Retail/ Office
Tell us about your background (Insurance, Financial, Tax Prep., what you did before) *	Risk Management prior to coming into the independent insurance agency model
Describe Your Present Situation and What has you exploring new opportunity? (Captive or Independent Agency) Motivation for exploring options? *	Start the process 5 years ago searching for a business to start/ buy in the community I reside as traveling over 100 nights a year and starting a family was not ideal.... 18 months ago - I found an independent agency principle that wanted to exit the business within 3 years. After working in the business and uncovering some red flags it makes sense for me to pursue a scratch agency. Pending a contact with a independent career and exploring other options to round out my beginning portfolio.
Please describe your typical Customer Profile	Commercial Lines
What are your most important needs? *	Professional Liability
What is Your Timeline in Making a Decision: *	45-60days

Present Agency Information:

Current Written Premium? (Captive/Independent) *	Scratch
PL%- VS - CL% ratio: *	Beginning 80% personal - then to move more Commerical as we scale
Lead Carrier(s): *	Erie
Plans going forward:	
Estimated Premium Year 1, 2, 3: *	250000, 350000, 500000
Estimated Commission Income Year 1, 2, 3: *	60000, 96000, 165000
Primary Sales Initiatives: *	Commission - aim to get bonus structure goals
Additional Information: non-completes, previous criminal convictions, carrier terminations, bankruptcy, etcâ€¦ *	Tough conversations! Nothing major or red flags
Date Signed: *	Sunday, December 6, 2020

DocuSigned by:

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