


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 *	Jarod Traynor
Phone Number *	(715) 651-8907
Email *	jarod.traynor31@gmail.com
Address *	 271 N Grant Ellsworth, Wisconsin 54011 United States
Planned Business Location (retail, office space, suite, home based) *	Pierce County Wisconsin
Tell us about your background (Insurance, Financial, Tax Prep., what you did before) *	Have been acting as a producer for 2 1/2yrs prior. I Bartended/Managed a taproom for 3 yrs, and prior to that(and still a little on the side) I sold custom interior woodworking
Describe Your Present Situation and What has you exploring new opportunity? (Captive or Independent Agency) Motivation for exploring options?) *	<p>I am looking to either start from scratch or perpetuate into an independent agency.</p> <p>I am exploring my options as I feel that there are quite a few concerns of the future of my current employer.</p>
Please describe your typical Customer Profile	Personal Lines
What are your most important needs? *	Guidance with what it takes to own an agency, and help getting appointed with the right carriers
What is Your Timeline in Making a Decision: *	1yr

Present Agency Information:

Current Written Premium? (Captive/Independent) *	200,000 However, My PL book transfers into the agency after first yr so I do not get PL renewals and have not calculated any PL sales over 1 yr old
PL%- VS - CL% ratio: *	80/20
Lead Carrier(s): *	Secura, West Bend, Auto-Owners, Progressive
Plans going forward:	
Estimated Premium Year 1, 2, 3: *	1- 400,000 2-500,000 3-600,000
Estimated Commission Income Year 1, 2, 3: *	1-40,000 2-86,000 3-141,000
Primary Sales Initiatives: *	I am partnering with Zywave as well as a firm that supplies suspect lists, direct mailers, SEO, and digital marketing
Additional Information: non-completes, previous criminal convictions, carrier terminations, bankruptcy, etcâ€¦ *	My non-compete bars me from directly marketing to any clients that are on the books with my current employer at the time of termination, wording specifically allows for inserts/EDDM and non "targeted" marketing
Date Signed: *	Friday, December 18, 2020

DocuSigned by:

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