

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 * Samantha Vannatta

Phone Number * (480) 297-3666

Email * sam@rbdinsuranceservices.com

Address * 
725 W Elliot Road 101-4
Gilbert, AZ 85233
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) * Insurance

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

Hi there, I am an independent agent and re-entered (slowly) the insurance world in 2017. I have been primarily focused commercial lines, especially hard to place commercial. I am now considering bringing on a personal lines producer as one of my clients is an accountant and would like to cross refer our clients to each other. He has over 1,000 clients and of course, there is also my existing commercial clientele. I really haven't pressed much for personal lines because I didn't have access to the preferred markets. Now that there is an opportunity to directly access and market these additional clients, I think your program is definitely something I need to learn about. I'm going to say "Personal Lines" below for my typical customer profile because that is what I'm wanting to gain access to.

Please describe your typical Customer Profile Personal Lines

What are your most important needs? * Competitive rates, product, & service

What is Your Timeline in Making a Decision: 1 month
*

Present Agency Information:

Current Written Premium? (Captive/Independent) 400,000+
*

PL%- VS - CL% ratio: * 10% PL - 90%

Lead Carrier(s): * PL:Foremost & Bristol West (haven't had need)

Plans going forward:

Estimated Premium Year 1, 2, 3: * 500,000 Additional

Estimated Commission Income Year 1, 2, 3: * 75,000 Additional

Primary Sales Initiatives: * to be determined :-)

Additional Information: non-completes, previous criminal convictions, n/a

carrier terminations,
bankruptcy, etcâ€! *

Date Signed: * Wednesday, December 2, 2020

DocuSigned by:
Samantha Vannatta
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