

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

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Address * 
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Planned Business Location (retail, office space, suite, home based) * Suite

Tell us about your background (Insurance, Financial, Tax Prep., what you did before) * I have 9 years in the insurance industry. I worked for State Farm for 7 years. I worked for Farmers for three years and completed their agent protege program. I opted not to go the captive route and build an independent agency instead.

Describe Your Present Situation and What has you exploring new opportunity? (Captive or Independent Agency) Motivation for exploring options?) * I am currently working as an agency producer for a Farmers Agent , but I am looking to open an independent agency within the next two months. I have worked under captive agents for 9 years and I would like to venture out on my own. I enjoy what I do and would like to finally take the leap and work for myself instead of building other agents books of business. I chose to pursue the independent route because as a captive producer I was limited by the carrier options I could offer my commercial clients. I would like to build an agency where I have control of my clients , marketing, branding and operations.

Please describe your typical Customer Profile Commercial Lines

What are your most important needs? * I would like to be able to offer my clients products that will benefit them , and still make a profit.

What is Your Timeline in Making a Decision: * As soon as possible or within the next two months if needed.

Present Agency Information:

Current Written Premium? (Captive/Independent) * Approx 256,000

PL%- VS - CL% ratio: * 65% - 35%

Lead Carrier(s): * Farmers , progressive, Chubb, Foremost, Usli , Liberty Mutual

Plans going forward:

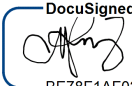
Estimated Premium Year 1, 2, 3: * 250,000, 400,000, 550,000

Estimated Commission Income Year 1, 2, 3: * 50,000, 80,000, 150,000

Primary Sales Initiatives: * I am active in my community and use that as a referral source. I intend on creating relationships with business owners through business workshops I will be hosting. I have created relationships with loan officers and dealerships which I hope to strengthen

Additional Information: non-completes, previous criminal convictions, carrier terminations, bankruptcy, etcâ€¦! * I have a non compete clause with my agent. None of the others apply

Date Signed: * Friday, January 8, 2021

DocuSigned by:

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