

## 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 \*** Patrick Peveler

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**Address \***   
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United States

**Planned Business** retail/office space

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

**Tell us about your background (Insurance, Financial, Tax Prep., what you did before) \*** PC agent with ALFA for 4 years, Financial Planner with Northwestern Mutual 4 years, Farmers Insurance 1 month

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

Decided I wanted to get back in the P&C world last summer. Was contacted by Farmers and State Farm last fall and went through the interview process for both. Selected Farmers due to their high initial pay structure for newer agents and lack of openings for State Farm in the immediate area. I'm working with another agent as a protégé agent initially with Farmers to get around the 50k they want you to have in assets. The other agent is a great guy but after looking at his numbers from the past year and working about 100 leads so far I'm wondering if this is a good long term plan. I'd like the ability to shop several A+ rated carriers to help the people I'm working with instead of being one and done. I joined CAC and Insurance Soup in the last year and from everything I've read this is the path that allows for more sustainable success.

**Please describe your typical Customer Profile** Personal Lines

**What are your most important needs? \*** If I'm going to put the time and effort in working 100s of leads I need to see a higher conversion ratio to make me feel good about the time I'm spending.

**What is Your Timeline in Making a Decision:** I don't have a lot of skin in the game in my current role so I'm pretty flexible.

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Present Agency Information:

**Current Written Premium? (Captive/Independent)** 0

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**PL%– VS – CL% ratio: \*** not sure yet

**Lead Carrier(s): \*** Farmers

Plans going forward:

**Estimated Premium Year 1, 2, 3: \*** I'd like to build to a million dollar book as possible

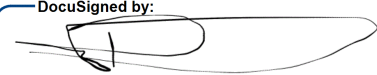
**Estimated Commission Income Year 1, 2, 3: \*** 100k

**Primary Sales Initiatives: \*** marketing as taught by CAC, buying leads, referral partners

**Additional Information: non-completes, previous criminal convictions,** 1 year with Farmers but that isn't a problem yet.

carrier terminations,  
bankruptcy, etcâ€! \*

Date Signed: \* Wednesday, January 13, 2021

DocuSigned by:  
  
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