

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 * Jeremy Ochsner

Phone Number * (775) 657-6050

Email * jeremy@ochsnerinsurance.com

Address * 
3670 Grant Drive STE 106
Reno, NV 89509
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) * Licensed 6/25/2020 P & C, H & L, merchant services business 2/2010-present

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

Captive without training. Lack of support for pacific time zone. Underwriting problems, typically without explanation. Compensation on life policies was less than I was quoted, ie fine print got me. Don't know the carrier appetite, so its difficult to market without knowing their appetite. I have commercial risks they don't want to cover. Then I'm forced to go to their brokerage, which is great, however, not a responsive as I'd hoped for.

I want to help and serve families and businesses. I want to cover and protect them properly with options. My network is finding out what I'm doing and I've received three commercial requests in the past week. Non- which we can write directly at my captive.

Please describe your typical Customer Profile Personal Lines

What are your most important needs? * Support and Training

What is Your Timeline in Making a Decision: 3-6 months
*

Present Agency Information:

Current Written Premium? (Captive/Independent) * P&C \$32446 Life\$6023

PL%- VS - CL% ratio: * 100% PL

Lead Carrier(s): * American National

Plans going forward:

Estimated Premium Year 1, 2, 3: * \$250k, \$610k, \$1,000k

Estimated Commission Income Year 1, 2, 3: * 87.5. 122,000, 150,000

Primary Sales Initiatives: * n/a

Additional Information: non-completes, previous criminal convictions, Not sure on the non-compete

carrier terminations,
bankruptcy, etcâ€¦ *

Date Signed: * Tuesday, February 16, 2021

DocuSigned by:
Jeremy Ochsner
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