

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 * Charley Windham

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Address * 
8432 Veterans Pkwy Ste 200
Columbus, GA 31909
United States

Planned Business Retail

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

Tell us about your background (Insurance, Financial, Tax Prep., what you did before) * Management for over 10 years, in insurance for 8 years and owned my agency for a year

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

I have owned a captive agency for a year with Farmers. I have changed the way we do business and I believe being captive is holding us back from utilizing the changes. We have moved to automation and generating our own leads online. Having exclusive leads are awesome but not when you are captive and only can provide rates for one company. Plus my agency's personal pipeline doesn't align with Farmers targeted customer base. My agency motto is "What's best for our customer". I don't think being captive let's us fully grasp that concept due to we can only do what's best for our customer with Farmers only.

Please describe your typical Customer Profile Personal Lines

What are your most important needs? * the ability to shop rates with several different companies to help our customers find the coverage they need and can afford

What is Your Timeline in Making a Decision: 2-6 months
*

Present Agency Information:

Current Written Premium? (Captive/Independent) * \$889k

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

Lead Carrier(s): * Farmers

Plans going forward:

Estimated Premium Year 1, 2, 3: * year 1 \$1mil year 2 \$2.5 mil year 3 \$4mil

Estimated Commission Income Year 1, 2, 3: * year 1 \$80k year 2 \$200k year 3 \$350k

Primary Sales Initiatives: * customer needs

Additional Information: non-completes, previous criminal convictions,

carrier terminations,
bankruptcy, etc. *

Date Signed: * Friday, February 26, 2021

DocuSigned by:

Charley Windham

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