


## 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

<b>Name *</b>	Spencer Andreason
<b>Phone Number *</b>	(801) 698-2964
<b>Email *</b>	<a href="mailto:sandreason4@gmail.com">sandreason4@gmail.com</a>
<b>Address *</b>	 2545 W 850 N Layton, Utah 84041 United States
<b>Planned Business Location (retail, office space, suite, home based) *</b>	Office Space
<b>Tell us about your background (Insurance, Financial, Tax Prep., what you did before) *</b>	Account manager with the Utah Jazz, Insurance for the last 6 months
<b>Describe Your Present Situation and What has you exploring new opportunity? (Captive or Independent Agency) Motivation for exploring options?) *</b>	I am currently working for an independent insurance agency. I realized that I really like insurance and that I am good at it. Before I grow my book I want to make sure I own my agency and am not working for somebody else.
<b>Please describe your typical Customer Profile</b>	Commercial Lines
<b>What are your most important needs? *</b>	Carriers, Maybe a little training but I feel I am a quick learned and have most of the carrier down on the independent side.
<b>What is Your Timeline in Making a Decision: *</b>	Pretty Quick

Present Agency Information:

<b>Current Written Premium? (Captive/Independent) *</b>	350,000
<b>PL%- VS - CL% ratio: *</b>	PL = 50% CL= 50%
<b>Lead Carrier(s): *</b>	Travelers, Hartford, Liberty Mutual, Mountain States
Plans going forward:	
<b>Estimated Premium Year 1, 2, 3: *</b>	1: 750,000 2:1,500,000 3: 2,000,000
<b>Estimated Commission Income Year 1, 2, 3: *</b>	1: 85-90k 2: 175-180k 3: 235k
<b>Primary Sales Initiatives: *</b>	I have lots of contacts with the Utah Jazz, Property managers, mortgage officers, lenders, and real estate agents
<b>Additional Information: non-completes, previous criminal convictions, carrier terminations, bankruptcy, etcâ€¦ *</b>	None
<b>Date Signed: *</b>	Wednesday, March 3, 2021

DocuSigned by:  
  
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