


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 *	Michael Marshall
Phone Number *	(678) 920-2330
Email *	marshall.michaelp@gmail.com
Address *	 2150 Burning Tree Drive Grand Rapids, Michigan 49546 United States
Planned Business Location (retail, office space, suite, home based) *	Looking to move to Georgia. Home based to start
Tell us about your background (Insurance, Financial, Tax Prep., what you did before) *	Insurance Producer
Describe Your Present Situation and What has you exploring new opportunity? (Captive or Independent Agency) Motivation for exploring options?) *	I have been in insurance since 2012. My 1st job was selling auto insurance in a nationwide call center for 21st Century (Farmers). In 2014 I left and joined an independent agency. I absolutely loved it there. However certain things that were part of the plan started to change. Luckily I was already being approached by another agency and signed on with them in 2016. It was a tough choice but a good one. But my name is not on the door and I do not have control or ownership in my future. This is why I would like to explore a new opportunity.
Please describe your typical Customer Profile	Personal Lines
What are your most important needs? *	Support and backend systems and processes

What is Your Timeline in Making a Decision: * Open for discussion

Present Agency Information:

Current Written Premium? (Captive/Independent) * 2016–2021 book value is \$1.2m / 2014–2016 book value \$850k

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

Lead Carrier(s): * Citizens, AutoOwners, Safeco, Frankenmuth, Progressive

Plans going forward:

Estimated Premium Year 1, 2, 3: * (New each year) \$400k – \$500k – \$550k

Estimated Commission Income Year 1, 2, 3: * \$52k – \$109k – \$164k

Primary Sales Initiatives: * Starting at \$0 in a new state – Primary goal is to build up a book quickly 1st 12 months then look to hire service to focus sales. Make connections with COIs but primary leads will be internet and social media as main focus

Additional Information: non-completes, previous criminal convictions, carrier terminations, bankruptcy, etc. * None.

Date Signed: * Thursday, March 4, 2021

DocuSigned by:

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