

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 * Bette Ann Mitchell

Phone Number * (352) 507-2421

Email * bam0864@gmail.com

Address * 
7633 NW 168th Lane
Trenton , FL 32693
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) * Insurance CSR 02/17-04/21, 2-20 license 04/21,, Payroll, HR, full charge bookkeeper, office manager

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

I just received my 2-20!!

I am 56 and have FINALLY figured out what I want to do for a career, not just a job (which is what I've always had).

I am currently at an agency with 3 offices (7 total employees and the owner). I am the office manager at my location and have 2 CSRs.

I did my conversion to a 2-20 on my own without including my boss until I had completed my test and passed. His response "That was a good investment! I'll appoint you as the agent for this location and give you a 50 cents per hour raise!!" (He's a great guy). We are hourly, no commission.

I decided it was time to stop working for this type of person and be my own boss!!
I love the insurance world, have a nice following of customerâ€™s that will come with me!
My daughter just started her class to get her 4-40. Our plan is for her to join me, then itâ€™s
something I can pass on to her!
I AM SO EXCITED ABOUT THIS NEW CHAPTER OF MY LIFE!!

Please describe your typical Customer Profile Personal Lines

What are your most important needs? * Appointments

What is Your Timeline in Making a Decision: 2 weeks- a month
*

Present Agency Information:

Current Written Premium? (Captive/Independent) Independent
*

PL%- VS - CL% ratio: * Not positive, Iâ€™d guesstimate 75% vs 25%

Lead Carrier(s): * Progressive, Bristol West, Dairyland, National General, ASI, American Integrity, Universal, Fed Nat

Plans going forward:

Estimated Premium Year 1, 2, 3: * I need help figuring this

Estimated Commission Income Year 1, 2, 3: * I need help figuring this

Primary Sales Initiatives: * I need help figuring this

Additional Information: non-completes, previous criminal convictions, carrier terminations, bankruptcy, etcâ€¦ * I had a felony charge in 2001, completed a PreTrial Intervention and charges dropped. Fl Dept of Insurance has all documents and have issued both 4-40 and 2-20, did not lose voting privileges

Date Signed: * Saturday, April 10, 2021

DocuSigned by:
Bette Ann Mitchell
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