## **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  $\hat{a} \in \mathbb{C}$  Draft $\hat{a} \in \bullet$  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.

Contact Information	
Name *	Nate Neal
Phone Number *	(909) 713-8380
Email *	nateforinsurance@gmail.com
Address *	8280 Aspen St #135 Rancho Cucamonga , CA 91730 United States
Planned Business Location (retail, office space, suite, home based) *	Office Space
Tell us about your background (Insurance, Financial, Tax Prep., what you did before…) *	Agency owner for a captive agency for the last 3 years, producer for 2 years prior. Before that I owned a mortgage brokerage.
Describe Your Present Situation and What has you exploring new opportunity? (Captive or Independent Agency…Motivation for exploring options?) *	l'm currently in a captive agency owner and our corporate focus is not on the market here in California. I want to explore going the independent route before looking to leave and going to another captive situation.
Please describe your typical Customer Profile	Personal Lines
What are your most important needs? *	Carrier access and support while learning the independent side of things.
What is Your Timeline in Making a Decision: *	Approximately 2–3 months.
Present Agency Information:	
Current Written Premium? (Captive/Independent) *	1.4 million captive

PL%- VS - CL% ratio: *	100% PL
Lead Carrier(s): *	Captive and some Progressive when it doesn't fit our bucket
Plans going forward:	
Estimated Premium Year 1, 2, 3: *	\$500,000, 1,000,000, 1.5 M
Estimated Commission Income Year 1, 2, 3: *	\$60k, \$120k, \$180k
Primary Sales Initiatives: *	Identifying ideal customers and prospects, utilizing technology (AE, CAC) to stay in front of both. Establishing a portion of commercial lines to my book of business.
Additional Information: non– completes, previous criminal convictions, carrier terminations, bankruptcy, etc… *	1 year non compete on current book
Date Signed: *	Wednesday, April 14, 2021

