


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 *	Jamison Sheffer
Phone Number *	(909) 528-4000
Email *	jamison.sheffer@gmail.com
Address *	 1226 Wendy Lane Cheyenne, Wyoming 82009 United States
Planned Business Location (retail, office space, suite, home based) *	Office Space/Retail
Tell us about your background (Insurance, Financial, Tax Prep., what you did before) *	Current State Farm Agent
Describe Your Present Situation and What has you exploring new opportunity? (Captive or Independent Agency) Motivation for exploring options? *	I am a State Farm Agent in my TICA year. I love insurance, but every day I can clearly see the flaws of being a captive agent. State Farm's technology is showing its age, and they have limits as to what they can write. I develop real relationships with people who want to stay with me, and sometimes they are unable to do so. Not only that, but I am building a book that I will have no control over. Also, the commissions are better for the independent agents. There really doesn't seem to be a reason to be a captive agent.
Please describe your typical Customer Profile	Personal Lines
What are your most important needs? *	A modern computer system that works.
What is Your Timeline in Making a Decision: *	I am not in a hurry. I will get my contract with State Farm (things are going well), but I would rather put that energy

into building a book that I can keep and sell according to my desires.

Present Agency Information:

Current Written Premium? (Captive/Independent) * My team members tend to do around \$30,000/month each.

PL%- VS - CL% ratio: * We are very heavy Personal Lines right now, but only because Commercial takes SO LONG to quote with State Farm.

Lead Carrier(s): * State Farm.

Plans going forward:

Estimated Premium Year 1, 2, 3: * If I stay here at State Farm I would like to write \$40,000/per team member per month.

Estimated Commission Income Year 1, 2, 3: * I am not taking much home at the moment. I am investing everything that i can into my business.

Primary Sales Initiatives: * We do cold-calls for business. We do Internet leads, SEO, google ads, facebook and instagram ads and mailers for Personal Lines.

Additional Information: non-completes, previous criminal convictions, carrier terminations, bankruptcy, etcâ€¦ * The standard State-Farm non-compete regarding my current book.

Date Signed: * Thursday, April 15, 2021

DocuSigned by:
Jamison Sheffer
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