


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

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| Name * | MARK WALLACE |
| Phone Number * | (405) 609-9169 |
| Email * | tammyw@myhcaa.net |
| Address * |  1230 BLACKJACK CIRCLE BLANCHARD, OK 73010 United States |
| Planned Business Location (retail, office space, suite, home based) * | OKLAHOMA CITY, OKLAHOMA |
| Tell us about your background (Insurance, Financial, Tax Prep., what you did before) * | Licensed in Health and Life, Property and Casualty, Commercial and I have my Series 6 and 63 |
| Describe Your Present Situation and What has you exploring new opportunity? (Captive or Independent Agency Motivation for exploring options?) * | We currently own a Health Insurance Agency and an Allstate agency in OKC Oklahoma. We have done Health for over 8 years and we bought Allstate in December 2017. It was a book of \$230,000 and we are currently at 2.3 written and advanced and 2.15 earned. Our auto is at 81% retention and 87% for home retention. Allstate has made so many changes we just aren't comfortable being captive anymore and we would love to have the ability to save people and make more sales if we had more options. |
| Please describe your typical Customer Profile | Personal Lines |
| What are your most important needs? * | Honestly... money and success!! Thought this might be a trick question, lol! |

What is Your Timeline in Making a Decision: *

Would like to be Indy by first of next year but we know it will take at least 6 months to get ready and we still have to sell our book... so the sooner the better!

Present Agency Information:

Current Written Premium? (Captive/Independent) *

2.15 Million

PL%- VS - CL% ratio: *

100% Personal

Lead Carrier(s): *

Quote Wizard, Prospects for Agents, Avenge, Referrals,

Plans going forward:

Estimated Premium Year 1, 2, 3: *

1)- 800 to 1 Million 2)-1 Million to 1.5 3)-1.5 to 2 Million

Estimated Commission Income Year 1, 2, 3: *

Right now we are only making about 300K annually, not counting bonuses... we would like more than that !

Primary Sales Initiatives: *

Manage and Coach agents, Create a great Culture , Streamline Pipeline, Increase Visibility

Additional Information: non-completes, previous criminal convictions, carrier terminations, bankruptcy, etcâ€¦ *

Non Compete with Allstate

Date Signed: *

Friday, April 16, 2021

DocuSigned by:

Mark Wallace

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