


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 *	Kris McDaniel
Phone Number *	(281) 935-7190
Email *	krisgcd1984@gmail.com
Address *	 24230 Pine Canyon Falls Houston, TX 77095 United States
Planned Business Location (retail, office space, suite, home based) *	Conroe
Tell us about your background (Insurance, Financial, Tax Prep., what you did before) *	10 Years Insurance/Sales Management
Describe Your Present Situation and What has you exploring new opportunity? (Captive or Independent Agency) Motivation for exploring options? *	Currently captive, agent with Liberty Mutual for three years, worked with Allstate as a sales agent and sales manager for the past seven years. In the captive market with Allstate we've gone through many changes and a lot of control has been taken away from the agency model. Long term vision for me is to continue to serve customers and bring value through education, coverage options, and service. Speaking with close friends in the IA market it seems every year the lines between what we bring clients as a captive versus what can be brought as an IA get more and more appealing.
Please describe your typical Customer Profile	Personal Lines
What are your most important needs? *	Access to carriers that fit a value driven sales model

What is Your Timeline in Making a Decision: * Six months to a year

Present Agency Information:

Current Written Premium? (Captive/Independent) * \$4 Million

PL%- VS - CL% ratio: * 75%PL / 25%CL

Lead Carrier(s): * Allstate

Plans going forward:


Estimated Premium Year 1, 2, 3: * Y1 - \$1million , Y2 - \$1.5Million , Y3 - \$2million

Estimated Commission Income Year 1, 2, 3: * Y1 - \$120,000 Y2 - \$180,000 Y3 - \$240,000

Primary Sales Initiatives: * 5 Year goal - 1) Four rock star agents onboarded at \$45k/m average prem 2) Acquisition cost under \$150/customer 3) Sales culture meets agency core values

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

Date Signed: * Saturday, April 17, 2021

DocuSigned by:

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