

## 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 \*** Jordan Turner

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**Address \***   
1601 E Cooke Road  
Columbus, 36 43224  
United States

**Planned Business** Home based or small office

**Location (retail, office space, suite, home based) \***

**Tell us about your background (Insurance, Financial, Tax Prep., what you did before) \*** Current captive insurance agent for 3.5 years – 10 total years in the industry

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

Current captive agent with State Farm. I launched a scratch agency January 2018 and while I've had "sustainable growth", I'm hitting a wall with the team aspect. I keep reinvesting my profits into building a team and I continue to fail to retain capable sales people.

I'm looking for an opportunity to build a book of business on my own with less restrictions on office set-up / team expectations and a wider array of carrier options for personal and commercial lines. In my current situation, though SF's rates are highly competitive in my area, my team and I turn away a ton of business due to price or eligibility. It would be awesome to have the options

available to help them and focus on selling our value as their risk manager instead of having the carrier barrier to overcome first.

**Please describe your typical Customer Profile** Personal Lines

**What are your most important needs? \*** Carrier options for personal, commercial, and life – book ownership – simple platform for servicing existing customer base

**What is Your Timeline in Making a Decision:** By the end of 2021  
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Present Agency Information:

**Current Written Premium? (Captive/Independent) \*** \$1.25MM Captive

**PL%- VS – CL% ratio: \*** 90 / 10

**Lead Carrier(s): \*** State Farm

Plans going forward:

**Estimated Premium Year 1, 2, 3: \*** \$600k year 1 – \$750k year 2 – \$1MM year 3

**Estimated Commission Income Year 1, 2, 3: \*** \$60k year 1 – \$75k year 2 – \$100k year 3 (yrs 2/3 not factoring in renewals)

**Primary Sales Initiatives: \*** Expanding on my current referral relationships with other industry professionals, aged leads, community events / involvement, online presence

**Additional Information: non-** Non-compete with State Farm

completes, previous  
criminal convictions,  
carrier terminations,  
bankruptcy, etcâ€¦ \*

Date Signed: \* Tuesday, April 27, 2021

DocuSigned by:  
*Jordan Turner*  
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