


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 *	Terry Wolfe
Phone Number *	(606) 923-5908
Email *	ttwolfe8@gmail.com
Address *	 1113 richmond green dr Apt 4 Richmond, Kentucky 40475 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) *	1 year as a producer with State Farm and 1 year 6 months as an agency owner with Shelter Insurance
Describe Your Present Situation and What has you exploring new opportunity? (Captive or Independent Agency) Motivation for exploring options?) *	I'm a captive agent with a company who has incredible high rates on almost every product in my area. The name of the game is to quote at least 10 family's to sale 1 of those. They love life insurance which in all honestly I am terrible at selling. I can't even sale my natural market because the rates are so bad.
Please describe your typical Customer Profile	Personal Lines
What are your most important needs? *	Good rates in my natural market with CAC to help me grow
What is Your Timeline in Making a Decision: *	I'm looking at opening no later than the end of the year hopefully by the next 3 months if I can find a place.

Present Agency Information:

Current Written Premium? (Captive/Independent) *	500000
PL%- VS - CL% ratio: *	90%PL
Lead Carrier(s): *	Shelter
Plans going forward:	
Estimated Premium Year 1, 2, 3: *	I would like to hit 500,000 my first year, second year would like to be near 750,000 3rd year 1,000,000
Estimated Commission Income Year 1, 2, 3: *	Year 1 50,000+ year 2 100,000+ year 3 150,000
Primary Sales Initiatives: *	Primarily will focus on referrals from my home town that I can actually quote now. I would like to become automated using some of the helpful tools that is offered. Year 2 I want to hire a producer.
Additional Information: non-completes, previous criminal convictions, carrier terminations, bankruptcy, etcâ€¦ *	I donâ€™t have anything other than maybe a non compete in my current area but I donâ€™t plan to start it here and Iâ€™m not sure I even have it.
Date Signed: *	Wednesday, June 2, 2021

DocuSigned by:
Terry Wolfe
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