


## 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

<b>Name *</b>	Crystal Perez
<b>Phone Number *</b>	(435) 260-2809
<b>Email *</b>	<a href="mailto:crystal@cableinsuranceagency.com">crystal@cableinsuranceagency.com</a>
<b>Address *</b>	 2508 104th PL SE Everett, WA 98208 United States
<b>Planned Business Location (retail, office space, suite, home based) *</b>	Home Based
<b>Tell us about your background (Insurance, Financial, Tax Prep., what you did before) *</b>	10+ years insurance formerly with Farmers Insurance as District Business Consultant, Recruiter and Agency Staff Member
<b>Describe Your Present Situation and What has you exploring new opportunity? (Captive or Independent Agency) Motivation for exploring options?) *</b>	<p>I recently opened my own agency and I am looking for options to write new business for property &amp; casualty clients.</p> <p>I have an active lead flow from my active life insurance clients who are requesting I help protect their other assets.</p> <p>My goal is to eventually, once pandemic is over open a retail office space in WA and TX as I am licensed in both states.</p>
<b>Please describe your typical Customer Profile</b>	Commercial Lines
<b>What are your most important needs? *</b>	Reliable systems and processes.
<b>What is Your Timeline in Making a Decision: *</b>	This month.

Present Agency Information:

<b>Current Written Premium? (Captive/Independent) *</b>	Independent \$10,000k 1 month life insurance
<b>PL%- VS - CL% ratio: *</b>	100
<b>Lead Carrier(s): *</b>	Americo & Mutual of Omaha
Plans going forward:	
<b>Estimated Premium Year 1, 2, 3: *</b>	1st year \$10k/month increase to \$40k/month
<b>Estimated Commission Income Year 1, 2, 3: *</b>	90% commission rate average of \$10k/month
<b>Primary Sales Initiatives: *</b>	Protect as many families as I can and develop my agency towards success!
<b>Additional Information: non-completes, previous criminal convictions, carrier terminations, bankruptcy, etcâ€¦! *</b>	I have no non-competes, no previous criminal convictions or terminations as well as no bankruptcy.
<b>Date Signed: *</b>	Tuesday, June 1, 2021

DocuSigned by:  
  
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