


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 *	Christopher Roseboom
Phone Number *	(239) 450-4912
Email *	chrisroseboom92@gmail.com
Address *	 15043 BLACK SCOTER DR WINTER GARDEN, FL 34787 United States
Planned Business Location (retail, office space, suite, home based) *	Nothing is out of the question. Planning to take your recommendation on this but probably leaning towards an office space to start. I'd imagine retail is going to be a heavy cost in my area to start out.
Tell us about your background (Insurance, Financial, Tax Prep., what you did before) *	P&C for about 5 and a half years now. Worked most of that time as a broker for Liberty Mutual when they couldn't get the business directly. Currently working for a local State Farm office. Also 215 licensed.
Describe Your Present Situation and What has you exploring new opportunity? (Captive or Independent Agency) Motivation for exploring options?) *	Currently working as a captive agent for State Farm. Going independent has been an idea in my head for a few years now. Probably not too long after joining the Insurance Soup page and seeing nearly every agent that moved from being captive to being independent rave about their new found love for their career. At my job now, I feel like I do a ton of my own prospecting, am limited to State Farm as a carrier, and building a huge book of business for someone else. I am passionate about what I do and I feel like I'm in a good position financially to be able to make the jump.
Please describe your typical Customer Profile	Personal Lines

What are your most important needs? * Learning successful marketing tactics and skills. Furthering my prospecting knowledge.

What is Your Timeline in Making a Decision: * I am ready to make a decision. Armed with more information, I don't see any reason I wouldn't be able to make a decision within the next couple of months.

Present Agency Information:

Current Written Premium? (Captive/Independent) * I am currently writing roughly \$20k-\$35k in annual P&C and life premium a month with State Farm and their strict underwriting being what I would consider a big factor in not writing more.

PL%- VS - CL% ratio: * 100% PL

Lead Carrier(s): * State Farm

Plans going forward:

Estimated Premium Year 1, 2, 3: * 250000

Estimated Commission Income Year 1, 2, 3: * Not sure to be honest. I only know the captive world and have made \$70,000+ with Liberty Mutual. I'll go with \$40k-\$50k year 1, \$50k+ year 2, \$60k+ year 3.

Primary Sales Initiatives: * I am big on creating a solid foundation of processes that can lead to consistency. Maintaining integrity and honesty between myself and customers as well as any possibly employees. Communicate value in myself and the product. Growth is the goal.

Additional Information: non-completes, previous criminal convictions, carrier terminations, bankruptcy, etcâ€¦ * I don't have anything to worry about except I'm sure I will have to sign something when I leave State Farm saying I won't steal any of their processes or book of business. Nothing out of the ordinary.

Date Signed: * Friday, June 18, 2021

DocuSigned by:
Christopher Roseboom
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