

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 * Lothaire Brant

Phone Number * (813) 765-6701

Email * Brant.Lothaire@gmail.com

Address * 
4515 River Overlook Dr
Valrico, FL 33596
United States

Planned Business suite

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

Tell us about your background (Insurance, Financial, Tax Prep., what you did before) * Been licensed insurance Agent with 220 & 215 license since 1989,

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

Myself and my business partner have owned an Allstate Agency since 2009 and although grateful for the Allstate experience we do not feel, and haven't for a while now, it is a good fit anymore. We have been looking into other opportunities and landed on 2 , Goosehead and We Insure. However as with all businesses there are pros and cons to each and we have not been able to finalize our decision yet. We leave for Texas this Friday to see the Goosehead opportunity first hand. In the meantime I was referred to The Insurance Soup and CIA so before making our final decision I want to be sure I look at the CIA opportunity. We have given our 90 days notice to Allstate and close our Agency on 9/27/21.

Please describe your typical Customer Profile Personal Lines

What are your most important needs? * Carriers, Support, Positive Company Culture,

What is Your Timeline in Making a Decision: ASAP as Allstate doors close 9/27 and other two companies are waiting my answer
*

Present Agency Information:

Current Written Premium? (Captive/Independent) * 1.4 million for Broker & 3.3 million

PL%– VS – CL% ratio: * 99% PL and 1% CL

Lead Carrier(s): * Tower Hill

Plans going forward:

Estimated Premium Year 1, 2, 3: * 1 million a year, over 3 mil or more by yrs 3

Estimated Commission Income Year 1, 2, 3: * not sure about this one

Primary Sales Initiatives: * *Improve productivity , More Carriers to accommodate more clients, Improve on Systems and processes for more efficiency.

Additional Information: non-completes, previous criminal convictions, Currently with Allstate so I will have a 12 month non-compet

carrier terminations,
bankruptcy, etcâ€; *

Date Signed: * Tuesday, July 27, 2021

DocuSigned by:
Lothaire Brant
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