


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 *	Sulema Lambert
Phone Number *	(541) 687-3598
Email *	sulielambert@gmail.com
Address *	 20782 ALPINE RIDGE PL 20782 Bend, OR 97701 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) *	Insurance, Finance and HR
Describe Your Present Situation and What has you exploring new opportunity? (Captive or Independent Agency) Motivation for exploring options?) *	I am currently a captive agent with Allstate. I have been working with them since 2019 and before that under and agent for 6 months. I have always been interested in being an independent but want to start out with a little more structure to learn the industry. In October I will have been in the industry for 3 years and I am ready for change. :-) I'm ready to give option instead of a yes or no.
Please describe your typical Customer Profile	Personal Lines
What are your most important needs? *	Systems to track client needs/policy's and to efficiently quote
What is Your Timeline in Making a Decision: *	Early 2022

Present Agency Information:

Current Written Premium? (Captive/Independent) *	750000
PL%- VS - CL% ratio: *	90/10
Lead Carrier(s): *	various
Plans going forward:	
Estimated Premium Year 1, 2, 3: *	500,000/1,000,000/1,750,000
Estimated Commission Income Year 1, 2, 3: *	75k/150k/225k
Primary Sales Initiatives: *	To build a well rounded book of business that will encompass a personal, life and commercial lines
Additional Information: non-completes, previous criminal convictions, carrier terminations, bankruptcy, etcâ€¦ *	none- Non compete with Allstate for current book of business
Date Signed: *	Monday, July 1, 2019

DocuSigned by:
Sulema Lambert
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