


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 *	MARIA ALTMAN
Phone Number *	(951) 279-9090
Email *	maria@ptmins.com
Address *	 1700 Hamner Ave. Suite 103 Norco, CA 92860 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
Describe Your Present Situation and What has you exploring new opportunity? (Captive or Independent Agency) Motivation for exploring options?) *	Independent agency in Southern California seeking to get access to more carriers especially with homeowner's insurance as it's been getting very tough lately. Majority of our customers want the "bundle discount" and we only have 3 carriers that can offer that. Staff is down to only 2 producers, 1 producer left to be a stay at home Mom and we've b
Please describe your typical Customer Profile	Personal Lines
What are your most important needs? *	Access to Carriers
What is Your Timeline in Making a Decision: *	ASAP

Present Agency Information:

Current Written Premium? (Captive/Independent) *	1,741,666.15
PL%- VS - CL% ratio: *	PL - 80%, CL - 20%
Lead Carrier(s): *	Mercury Insurance
Plans going forward:	
Estimated Premium Year 1, 2, 3: *	2,000,000; 2,250,000, 2,500,000
Estimated Commission Income Year 1, 2, 3: *	300,000; 337,500, 375,000
Primary Sales Initiatives: *	Cross-Sell, Win back customers that left, work on generating more referral partners
Additional Information: non-completes, previous criminal convictions, carrier terminations, bankruptcy, etcâ€¦ *	N/A
Date Signed: *	Monday, July 26, 2021

DocuSigned by:

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