


## 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>	Santos Portillo
<b>Phone Number *</b>	(713) 294-2779
<b>Email *</b>	<a href="mailto:portillosagency@outlook.com">portillosagency@outlook.com</a>
<b>Address *</b>	 13718 Lake Livingston Drive Houston, TX 77044 United States
<b>Planned Business Location (retail, office space, suite, home based) *</b>	1404A Stonehollow Drive, Kingwood TX 77339
<b>Tell us about your background (Insurance, Financial, Tax Prep., what you did before) *</b>	Insurance
<b>Describe Your Present Situation and What has you exploring new opportunity? (Captive or Independent Agency) Motivation for exploring options?) *</b>	I was with State Farm for 10 years 6 as agency manager and 4 as agency owner, left to the independent world by signing up with Brightway. I have been with Brightway for about 6 months and some things have not been as promised.
<b>Please describe your typical Customer Profile</b>	Personal Lines
<b>What are your most important needs? *</b>	Carrier appointments
<b>What is Your Timeline in Making a Decision: *</b>	Next 6 months
<b>Present Agency Information:</b>	
<b>Current Written Premium? (Captive/Independent) *</b>	150,000/ 3,000,000

<b>PL%- VS - CL% ratio: *</b>	80% / 20%
<b>Lead Carrier(s): *</b>	Progressive
Plans going forward:	
<b>Estimated Premium Year 1, 2, 3: *</b>	750k, 1mil, 1.25mil
<b>Estimated Commission Income Year 1, 2, 3: *</b>	\$112,500 - \$150,000 - \$187,500
<b>Primary Sales Initiatives: *</b>	Improve sales productivity
<b>Additional Information: non-completes, previous criminal convictions, carrier terminations, bankruptcy, etcâ€¦ *</b>	non- competes with State Farm end 11/20/21, dismissed bankruptcy in 2020
<b>Date Signed: *</b>	Monday, August 9, 2021

DocuSigned by:  
*Santos Portillo*  
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