


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.
-
-

Contact Information

| | |
|--------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Name * | Gerald LePain |
| Phone Number * | (401) 222-0845 |
| Email * | gerrylepain@gmail.com |
| Address * |  311 Harkney Hill Road COVENTRY, Rhode Island 02816 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 and investments since 1996, P&C last five years including owning an Allstate agency. |
| Describe Your Present Situation and What has you exploring new opportunity? (Captive or Independent Agency) Motivation for exploring options? * | Going the Indi route. Have space located in an CFP office. Knew captive was not for me when purchased Allstate agency. I've been in the industry from 1996 and want independence for growth and more control of how to run it. |
| Please describe your typical Customer Profile | Personal Lines |
| What are your most important needs? * | choice, flexibility and freedom |
| What is Your Timeline in Making a Decision: * | now |
| Present Agency Information: | |
| Current Written Premium? (Captive/Independent) * | Captive \$350k ending 8/1 |

PL%– VS – CL% ratio: * PL, 80% CL 20%

Lead Carrier(s): * Allstate

Plans going forward:


Estimated Premium Year 1, 2, 3: * \$500k, \$600k, \$700K

Estimated Commission Income Year 1, 2, 3: * over \$100k

Primary Sales Initiatives: * Referrals, contacts, centers of influence, marketing

Additional Information: non-completes, previous criminal convictions, carrier terminations, bankruptcy, etcâ€¦ * NA

Date Signed: * Thursday, August 12, 2021

DocuSigned by:

E89CF811B98F4B7...