


## 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

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| <b>Name *</b>   | ANA MARTINEZ   |
| <b>Phone Number *</b>   | (402) 812-4088   |
| <b>Email *</b>  | <a href="mailto:ANA@KCM-INSURANCE.COM">ANA@KCM-INSURANCE.COM</a>   |
| <b>Address *</b>  | <br>3214 L ST<br>OMAHA, NE 68107<br>United States   |
| <b>Planned Business Location (retail, office space, suite, home based) *</b>  | OFFICE BUILDING  |
| <b>Tell us about your background (Insurance, Financial, Tax Prep., what you did before) *</b>   | 13YRS IN INSURANCE, 11 CAPTIVE WITH STATE FARM AND 2 INDEPENDENT   |
| <b>Describe Your Present Situation and What has you exploring new opportunity? (Captive or Independent Agency) Motivation for exploring options?) *</b> | <p>Currently under an aggregator but parting ways starting in November.</p> <p>We started our agency from scratch on April 14th and currently have a book of a little over \$300k, which I own and will be taking with me.</p> |
| <b>Please describe your typical Customer Profile</b>  | Personal Lines   |
| <b>What are your most important needs? *</b>  | Clear communication and access to reports/commissions/book of business   |
| <b>What is Your Timeline in Making a Decision: *</b>  | Last day under current aggregator Nov 1st, 2021  |

## Present Agency Information:

|   |         |
|---|---------|
| <b>Current Written Premium? (Captive/Independent) *</b> | 300,000 |
|---|---------|

**PL%– VS – CL% ratio: \***

UNKNOWN– AGGREGATOR DOES NOT SHARE THAT WITH ME

**Lead Carrier(s): \***

NATIONWIDE, ENCOMPASS, TRAVELERS, PROGRESSIVE,  
ASSURANCE AMERICA, SAFECO

Plans going forward:

**Estimated Premium Year 1, 2, 3: \***

YR 1 –\$1,040,000 YR 2– \$1.5M YR 3 – \$2M

**Estimated Commission Income Year 1, 2, 3: \***

YR 1– \$145,000 YR 2 -- \$200,000 YR 3 – \$260,000

**Primary Sales Initiatives: \***

We currently have established relationships with loan officers, realtors, and dealerships in our area. We also have a heavy flow of customer referrals.

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

None

**Date Signed: \***

Friday, August 20, 2021

DocuSigned by:

*ANA MARTINEZ*

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