

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 * Brennan Patton

Phone Number * (919) 498-5573

Email * brennanpatton@gmail.com

Address * 
1306 Hermitage Rd
Sanford, North Carolina 27330
United States

Planned Business Suite Space/Home Based

Location (retail, office space, suite, home based) *

Tell us about your background (Insurance, Financial, Tax Prep., what you did before) * Insurance business since 2018 after graduating college. Entrepreneur minded before my journey in the insurance world I was a water sports coach.

Describe Your Present Situation and What has you exploring new opportunity? (Captive or Independent Agency) Motivation for exploring options?) *

My present situation I am an Agent Aspirant for a captive company where I have been since 2018. September 2018 I helped build a scratch captive agency to a top 50 agency in the state for our company. I began in 2018 with the intentions of owning my own agency with my captive career. After running an aspiring agents group for going on 2 years for experience in the leadership position while also being a top sales producer for the groups I became a site interview ready candidate for the captive company. One who listens too many independent agent podcast along with upcoming changes to the requirements for the company has me officially exploring more options. What motivated me to feel out this form is my dedication to wanting to becoming the best version of myself; I love this industry and I want to be great for myself, my clients, my family and the leaders I

have around me. At the same time I want my leaders and those around me to want me to be successful for the right reasons. Overall my motivation is to become free as an entrepreneur and make an impact on those around me.

Please describe your typical Customer Profile Personal Lines

What are your most important needs? * My most important need is having a the training and support as I would enter into the IA channel

What is Your Timeline in Making a Decision: 3-6 months
*

Present Agency Information:

Current Written Premium? (Captive/Independent) * Captive July 2020-July 2021 \$391,833

PL%- VS - CL% ratio: * PL%92- CL% 8

Lead Carrier(s): * State Farm

Plans going forward:

Estimated Premium Year 1, 2, 3: * 550k/1.5million/2.25 million

Estimated Commission Income Year 1, 2, 3: * Year one \$60,000, Year 2 100,000 Year 3 125,000

Primary Sales Initiatives: * Primary initiative is the pursuit of generational change and becoming the best version of myself. Promotions and all are great however my why to make sales is much deeper.

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

Post college student-athlete jumped right into insurance. Currently living in Sanford NC with my beautiful fiancÃ© and daughter.

Date Signed: *

Friday, August 20, 2021

DocuSigned by:
Brennan Patton
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