


## 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>	David Rheinholdt
<b>Phone Number *</b>	(503) 363-3162
<b>Email *</b>	<a href="mailto:David@rheinholdtinsuranceagency.com">David@rheinholdtinsuranceagency.com</a>
<b>Address *</b>	 1060 Erixon St NE Salem, OR 97301 United States
<b>Planned Business Location (retail, office space, suite, home based) *</b>	Office space
<b>Tell us about your background (Insurance, Financial, Tax Prep., what you did before) *</b>	I was a captive Agent with Farmers for 17 years. I have been Independent for about 1.5 years
<b>Describe Your Present Situation and What has you exploring new opportunity? (Captive or Independent Agency) Motivation for exploring options?) *</b>	<p>I was a Captive Agent with Farmers for 17 years. I left Farmers December 1st 2019 to go Independent. I have used Insure Zone and Stuckey but I am unhappy with the lack of control that I have when it comes to quoting and servicing. I am looking for direct appointments. I was thinking of going with Smart Choice but I am a member of the Insurance Soup group page and thought I would get some information from your organization. I would like to grow my P&amp;C but I know that I do not have the correct system in place currently and I am embarrassed on how long it takes to get quotes. I also do not necessarily no what I am selling because I am unable to see the actual policy or ask carrier underwriters questions directly. I also do not trust the quotes that I receive</p>

**Please describe your typical Customer Profile** Commercial Lines

**What are your most important needs? \*** Direct appointments without high production requirements

**What is Your Timeline in Making a Decision:** Now  
\*

Present Agency Information:

**Current Written Premium? (Captive/Independent) \*** 273,000 Independent

**PL%– VS – CL% ratio: \*** 15% PL and 36% CL

**Lead Carrier(s): \*** No Direct appointments

Plans going forward:

**Estimated Premium Year 1, 2, 3: \*** current is 273,000 55% of that is health Ins. I would like to grow P&C once I get the right fit

**Estimated Commission Income Year 1, 2, 3: \*** \$25,000. Year 2 \$50,000 Year 3 \$75,000

**Primary Sales Initiatives: \*** Referrals, Going after old Farmers Book, Building Online presence, ,

**Additional Information: non-completes, previous criminal convictions,** No to all above

carrier terminations,  
bankruptcy, etcâ€! \*

Date Signed: \* Wednesday, September 15, 2021

DocuSigned by:  
*David Reinholdt*  
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