

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 * Lisa Delgado

Phone Number * (909) 267-5556

Email * flex.lisa@gmail.com

Address * 
350 E Railroad Canyon Rd Suite 1A
Lake Elsinore, CA 92532
United States

Planned Business Location (retail, office space, suite, home based) * Office Suite

Tell us about your background (Insurance, Financial, Tax Prep., what you did before) * Operations Manager/Producer/Account Manager

Describe Your Present Situation and What has you exploring new opportunity? (Captive or Independent Agency) Motivation for exploring options?) * I have 14 years of experience working for the same Commercial Insurance Agency. I worked my way up from receptionist and now run the operations with no oversight or guidance. I am at a point in my career where I would like to go "all in" and make something real for myself and my family instead of building someone else's asset with literally no protection if something were to happen to the owner.

Please describe your typical Customer Profile Commercial Lines

What are your most important needs? * Ability to create a book of business that I own

What is Your Timeline in Making a Decision: * 2022

Present Agency Information:

Current Written Premium? (Captive/Independent) *	5,000,000
PL%- VS - CL% ratio: *	100% Commercial
Lead Carrier(s): *	Nonprofits Insurance Alliance of CA, Philadelphia, Great American, USLI
Plans going forward:	
Estimated Premium Year 1, 2, 3: *	400,000 / 800,000 / 1000000
Estimated Commission Income Year 1, 2, 3: *	40,000 / 80,000 / 100,000
Primary Sales Initiatives: *	Social Media, Cold Calling, Networking
Additional Information: non-completes, previous criminal convictions, carrier terminations, bankruptcy, etcâ€¦ *	I have no non-compete or contract. No criminal convictions, no carrier terminations, no bankruptcy.
Date Signed: *	Wednesday, September 22, 2021

DocuSigned by:

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