


## 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>	adam mcgrath
<b>Phone Number *</b>	(417) 616-7633
<b>Email *</b>	<a href="mailto:adammcgrath212@gmail.com">adammcgrath212@gmail.com</a>
<b>Address *</b>	 939 e weldon dr nixa, mo 65714 United States
<b>Planned Business Location (retail, office space, suite, home based) *</b>	home based at first
<b>Tell us about your background (Insurance, Financial, Tax Prep., what you did before) *</b>	home auto and life insurance
<b>Describe Your Present Situation and What has you exploring new opportunity? (Captive or Independent Agency) Motivation for exploring options? *</b>	I am slammed and need more freedom to do things how I want. I've done this for 11 years, and am not able to take as good of care of clients as I want because it's just me and my assistant. I want to be able to spend more time with a client if they really need help. My paycheck as a captive agent is still dependent on writing new business each week. I do not make much on renewals, even though my book is close to \$4,000,000. I want to investigate what it would look like to have my own business.
<b>Please describe your typical Customer Profile</b>	Personal Lines
<b>What are your most important needs? *</b>	efficient systems
<b>What is Your Timeline in Making a Decision: *</b>	3 months

Present Agency Information:

<b>Current Written Premium? (Captive/Independent) *</b>	captive. however, I do write insurance with about 12 companies.
<b>PL%- VS - CL% ratio: *</b>	I do not have a way to find this
<b>Lead Carrier(s): *</b>	liberty mutual (other frequent carriers we write with are travelers, hippo, progressive, asi)

Plans going forward:

<b>Estimated Premium Year 1, 2, 3: *</b>	right now I am on pace to write \$1,000,000 in premium this year. starting out with a new business, i would anticipate a decline initially. So, I would say 500k year 1, 600k year 2, and 750k year 3.
<b>Estimated Commission Income Year 1, 2, 3: *</b>	55k, 65k, 80k
<b>Primary Sales Initiatives: *</b>	not sure i understand this question.
<b>Additional Information: non-completes, previous criminal convictions, carrier terminations, bankruptcy, etcâ€¦  *</b>	2 year non compete
<b>Date Signed: *</b>	Wednesday, October 13, 2021

DocuSigned by:  
  
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