


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 *	James Rooberts
Phone Number *	(425) 616-0400
Email *	jamesroberts1210@gmail.com
Address *	 5449 Emerald Ct Mount Vernon, WA 98273 United States
Planned Business Location (retail, office space, suite, home based) *	Office space or home
Tell us about your background (Insurance, Financial, Tax Prep., what you did before) *	3 years as an agent. Previous work in real estate sales and 12 years as a claims adjuster.
Describe Your Present Situation and What has you exploring new opportunity? (Captive or Independent Agency Motivation for exploring options?) *	I currently work for AAA Washington which works as a independent agency. However, I'm looking to be able to expand and create a business around my ideas and not limited to the scope allowed by AAA. I believe there's a great deal more opportunity in the insurance space that I'm not allowed to go after, and I want a bigger piece of that pie.
Please describe your typical Customer Profile	Personal Lines
What are your most important needs? *	Flexibility.
What is Your Timeline in Making a Decision: *	3-12 months

Present Agency Information:

Current Written Premium? (Captive/Independent) *	650000
PL%- VS - CL% ratio: *	90% PL and 10% CL
Lead Carrier(s): *	Mutual of Enumclaw, Foremost Signature, Safeco, Progressive
Plans going forward:	
Estimated Premium Year 1, 2, 3: *	350k, 425, 500 in NB each year
Estimated Commission Income Year 1, 2, 3: *	\$35k \$74k, \$115k
Primary Sales Initiatives: *	Grow and expand
Additional Information: non- completes, previous criminal convictions, carrier terminations, bankruptcy, etcâ€¦ *	Ch 13 bankruptcy in January 2019
Date Signed: *	Monday, November 1, 2021

DocuSigned by:

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