

## 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 \*** Jeff Staloch

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**Address \***   
100 Cougar Ct  
Mankato, MN 56001  
United States

**Planned Business Location (retail, office space, suite, home based) \*** Office Space / Home

**Tell us about your background (Insurance, Financial, Tax Prep., what you did before) \*** Insurance

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

I've been working for the same Agency since 2010 and I've been mostly in the ag space. I've always wanted to get more involved with the marketing that you teach in CAC, that I accessed about 4 years ago, but I've had a hard time getting ownership on board and have done most things at my own expense. There is the "old guard" in the agency that i really wish would retire about 5 years ago and they still hang on. I'm at a point where i really think it would make sense to me to explore options of owning my own agency. I've done a lot with crop insurance and farm, and really like the commercial space. I generally steered clear from personal lines because of the low commissions paid by the agency I work for. I feel like there is great potential in that area as well as life insurance that I have not taken advantage of.

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

**What are your most important needs? \*** Access to quality markets but also support that makes everyone more successful.

**What is Your Timeline in Making a Decision:** Early 2022  
\*

**Present Agency Information:**

**Current Written Premium? (Captive/Independent) \*** Independent \$120,000 of revenue

**PL%- VS - CL% ratio: \*** 85% CL - 15%PL

**Lead Carrier(s): \*** Crop Risk Services (crop insurance carrier)

**Plans going forward:**

**Estimated Premium Year 1, 2, 3: \*** 500k , 1M, 1.5M

**Estimated Commission Income Year 1, 2, 3: \*** 65k , 100k, 175k

**Primary Sales Initiatives: \*** To market myself as an insurance leader in my area and grow and scale a successful insurance agency

**Additional Information: non-completes, previous criminal convictions,** N/A

carrier terminations,  
bankruptcy, etcâ€¦ \*

**Date Signed: \*** Monday, December 20, 2021

DocuSigned by:  
  
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