



**Please Complete, Sign or Fax to 1-866-275-1213 or Email
to Taylor@CareerInsuranceAgents.com**

This non-disclosure agreement (Agreement) is between Career Insurance Agents (CIA)/Premier Group Insurance (PGI) and Lee James (Prospect). Whereas CIA/PGI and Prospect 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/PGI will provide Prospect with an original copy "Draft" of its standard Agency/Agent contract (contract). In addition, CIA/PGI will provide Prospect with additional information, both orally and in writing, as to the operations and benefits of becoming an Independent Contractor with CIA/PGI.
2. Prospect agrees not to share this information with any third parties not explicitly approved by CIA/PGI and to use reasonable and practical care to protect and maintain possession of the contract and any other materials provided to Prospect by CIA/PGI. 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/PGI, Prospect will return all documents, materials, and notes both originals and copies to CIA/PGI within 15 days of the request.
4. In the event of a breach or threatened breach of this Agreement, CIA/PGI 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.

Career Insurance Agents:

Prospect:

PrintName _____

Print Name Lee James _____

Signature _____

Signature Lee James _____
DocuSigned by:
836934D52101494...

Title _____

Title Agent/Owner _____

Date _____

Date 1/14/2022 _____

Career Insurance Agents Prospective Agent Questionnaire

***All Information is held in strictest confidence.**

All fields must be completed with realistic and accurate answers in order to schedule a 1 on 1 video call with Taylor Dobbie

1. **Contact Information:** **Date:** 1/14/2022
 Name: Lee James
 Address: 1215 HWY 35 N
 City: BENTON State: AR Zip Code: 72019
 Office PH: 501-778-3393 Cell PH: 501-317-8344 Fax: 501-325-2669
 Preferred Email: ERVJ@ATT.NET

2. **Planned Business Location:** (retail, office space, suite, home based) OFFICE BUILDING

3. **Tell us about your background:** (Insurance, Financial, Tax Prep., what you did before...)
28 YEARS AS LIFE AND P&C AGENT

4. **Describe Your Present Situation:** (Captive or Independent Agency...Motivation for exploring options?)
CAPTIVE AGENT WANTING TO TRANSITION INTO INDEPENDENT AGENCY.

5. **What are Your Most Important Needs:**
CARRIER ACCESS FOR MY PREFERRED BOOK OF BUS. TO MAINTAIN INCOME.

6. **Please describe your typical Customer Profile:** (Preferred PL, Non-Standard PL, or Commercial – what segments...?) PL PREFERRED HOME AND AUTO

7. **What is Your Timeline in Making a Decision:** 4-6 months

8. Present Agency Information:

Written Premium Volume: 2.5 MILLION
PL% vs. CL% Split: 95% PL VS. 5% CL
Lead Carrier(s): AMERICAN NATIONAL

9. **Plans going forward:**
Estimated Premium Year 1, 2, 3: 300K, 400K, 500K
Estimated Commission Income Year 1, 2, 3: 100K, 150K, 180K
Primary Sales Initiatives:
IMPROVE AND BROADEN MY CARRIER ACCESS TO ALLOW GROWTH AND RETENTION.

10. **Additional Information:** e.g., non-completes, previous criminal convictions, carrier terminations, bankruptcy, etc...
GREAT CREDIT, NO CRIMINAL RECORD, NO CARRIER TERMINATIONS, 12 MO. NON-COPETE.