

CIA Prospective Agent Questionnaire

Contact Information

Name * Christy House

Phone Number * (757) 580-5898

Email * houseinsuranceagency@gmail.com

Address * 
4615 Pleasant Ave #A
Norfolk, VA 23518
United States

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

Do you have a dedicated home office space? *

Tell us about your background (Insurance, Financial, Tax Prep., what you did before) * Insurance and Financial Services for 16 years with Farmers.
Over 25 years exp in Insurance

Years of Insurance Industry Experience? *

Describe Your Present Situation and What has you exploring new opportunity? (Captive or Independent Agency) Motivation for exploring options? * Moving to NC and Farmers does not offer products

Please describe your typical Customer Profile * Personal Lines

Are you looking to add P&C to be: *

What are your most important needs? Carriers
*

What is Your Timeline in Making a Decision: * 60 days

Present Agency Information:

Current Written Premium? 1.2
(Captive/Independent) *

Personal Lines % -VS- Commercial 90% 10%
Lines% ratio: *

Who Are Your Current Carrier(s)? * Farmers Some Brokered

Plans going forward:

Estimated Premium Year 1, 2, 3: * 350000 700000 1000000

Additional Information/Concerns: Contracts
non-competes, previous criminal convictions, carrier terminations, bankruptcy, etcâ€¦ *

This non-disclosure agreement is I agree
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 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. *


How did you hear about CIA? Referred by current CIA Agent

What is the name of the CIA Agent who referred you? Jennifer Creed

Which Podcast?

** THERE IS A 5-7 SECOND DELAY AFTER SUBMITTING UNTIL IT TAKES YOU TO THE FINAL STEP. DO NOT EXIT OFF THIS PAGE! **

Date Signed: * Monday, August 8, 2022

DocuSigned by:

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