

FIRST INSURANCE[®]
— OF CANADA — FUNDING
A WINTRUST COMPANY

FirstInSite *Enhanced*

Submit a Quote

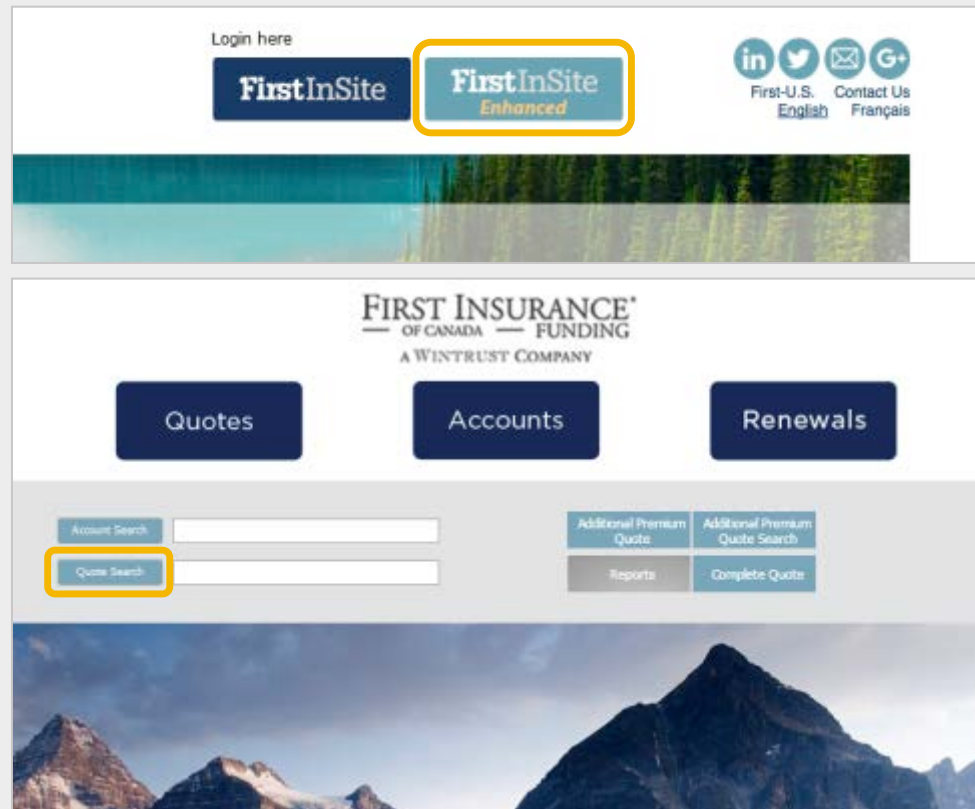
Submit a Quote

Topics covered in this guide:

1. Submit a Quote
2. Tips

Login

- › Click on the **First InSite Enhanced login button**
firstinsurancefunding.ca
- › Login with your user name (email address) and temporary password provided in your welcome email
- › Select **Quote Search**



Submit a Quote

- › Select quote you are looking to submit



TIP: Quotes that begin with a P still need policy details entered.

FirstInSite

Search

Quote #: Name:
Address: City:
Region: Postal Code:
Customer ID:

Specific Quotes:

			Quoted Date	Total Premium	Down Payment	# Pay
<input type="button" value="Payment Options"/>	P3509	Monarch Playing C...	04/23/2017	25,050.00	12,537.50	10
<input type="button" value="Payment Options"/>	3483	Marubeni Oil	04/23/2017	25,050.00	4,279.25	10
<input type="button" value="Payment Options"/>	3475	Plow King	04/23/2017	25,050.00	4,279.25	10
<input type="button" value="Payment Options"/>	3467	Plow King	02/17/2017	25,050.00	2,167.14	11
<input type="button" value="Payment Options"/>	P3434	Praxis Corporation	02/17/2017	10,000.00	578.00	10
<input type="button" value="Payment Options"/>	3400	Plow King	02/17/2017	10,000.00	1,700.00	10
<input type="button" value="Payment Options"/>	3392	Banana Barrel Ice C...	02/17/2017	7,000.00	1,190.00	10
<input type="button" value="Payment Options"/>	3384	Mercury Custom	02/17/2017	7,000.00	1,190.00	10
<input type="button" value="Payment Options"/>	3228	Mercury Custom	02/17/2017	20,000.00	3,400.00	10
<input type="button" value="Payment Options"/>	3202	WBW Security Inc.	01/31/2017	21,600.00	3,672.00	10
<input type="button" value="Payment Options"/>	P3194	RVN Technologies ...	03/02/2016	21,600.00	3,672.00	10
<input type="button" value="Payment Options"/>	3137	RVN Technologies ...	03/02/2016	21,600.00	3,672.00	10
<input type="button" value="Payment Options"/>	3129	Praxis Corporation	02/11/2016	27,000.00	4,590.00	10
<input type="button" value="Payment Options"/>	3046	Pony Tires & Brakes	02/11/2016	27,000.00	4,590.00	10
<input type="button" value="Payment Options"/>	P2642	Plow King	02/11/2016	27,000.00	4,590.00	10
<input type="button" value="Payment Options"/>	P2634	Vindilectrix	02/11/2016	81,000.00	13,770.00	10
<input type="button" value="Payment Options"/>		Vehement Capital P...	02/11/2016	81,000.00	13,770.00	10

90 Items

Select a quote to view or edit. Click New to create a new quote.

› Click **Edit** to open the quote

› Confirm insured's details



TIP: You can opt to send notifications to clients by email by clicking the check box

Quote - 3202 - RVN Technologies Inc.

Customer Information Policies Terms Summary Documents

Quoting for: A00003 - Best Insurance Brokers Inc. Ottawa, Ontario

Name & Address		Contact	
Name:	RVN Technologies Inc.	Main Phone:	
		Contact:	
Address:	4665 Victoria St. Nort	E-Mail:	
		Main Fax:	
City:	Ottawa		
Country:	Canada		
Province/Postal:	ON - Ontario	K1W 0A2	
Additional Addresses			
Email Notices to Customers:	<input type="checkbox"/>		
Customer ID:			

General Loan Information

Brokerage:	A00003 - Best Insurance Brokers Inc.	Line of Business:	Commercial
Pricing Program:	17% Down, 10 Installments	Preferred Language:	English
Terms:	17% Down, 10 Installments	New/Renewal:	New
Standard/Continuous Pay:	Standard		
Origination Code:			
Broker Contact:	sarah.smith@bestinsurance.ca - Sarah Smith		
Broker Phone:	(416) 785-7456		
Broker Email:	melissa.dinardo@firstinsurancefunding.ca		

Edit Close

- › Enter policy number and coverage type
- › Enter carrier and/or MGA information
- › Enter correct premium amount, fees and taxes and click **Save**

Quote Entry - 3236 - RVN Technologies

Customer Information Policies Terms							
Policy #	Eff Date	Carrier	Coverage	Premium	Em Fees	Fin Fees	Total
<input checked="" type="checkbox"/> 1	TBI	04/08/2016	GL	20,000.00	0.00	1,600.00	21,600.00 ✕

New Policy 21,600.00

Policy Details

Policy Number: Coverage:

Effective Date: Policy Term (Months):

Carrier:

MGA:

Premium: Return Method:

Policy Fees: Min. Earned Premium:

Taxes:

Total Amount:

- > If everything is correct click **Save**

Quote Entry - 3236 - RVN Technologies

Customer Information | Policies | Terms

Quote Variables

Governing Province	Ontario	Earned Broker Fee:	0.00
First Payment Due Date:	04/09/2016	Financed Broker Fee:	0.00
Billing Cycle:	Monthly	Down Payment:	17.000 % 3,672.00
Billing Method:	Pre-authorized Chequing	No. of Installments:	10
Disbursement Delay:	30 Days	APR:	10.990 %
Rate Chart:	Best Insurance Rate Plan		

Reset to Defaults Recalculate

General		Financials	
Governing Province	Ontario	APR:	10.990 %
First Payment Due Date:	04/09/2016	Flat Rate:	4.238 %
Billing Cycle:	Monthly	Total Premium:	21,600.00
Billing Method:	Pre-authorized Chequing	Down Payment:	17.000 % 3,672.00
Disbursement Delay:	30 Days	Amount Financed:	17,928.00
Rate Chart:	Best Insurance Rate Plan	Finance Charge:	915.40
Equal Pay Quote:	No	Total of Payments:	18,843.40
Earned Broker Fee:	0.00	No. of Installments:	10
Financed Broker Fee:	0.00	Installation Amount:	1,884.34

< Back Submit **Save** Cancel Next >

> Click **Submit**

Quote Entry - 3236 - RVN Technologies

Customer Information Policies Terms Summary Documents

Quote Variables

Governing Province:	Ontario	Earned Broker Fee:	0.00
First Payment Due Date:	04/09/2016	Financed Broker Fee:	0.00
Billing Cycle:	Monthly	Down Payment:	17.000 % 3,672.00
Billing Method:	Pre-authorized Chequing	No. of Installments:	10
Disbursement Delay:	30 Days	APR:	10.990 %
Rate Chart:	Best Insurance Rate Plan		

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Earned Broker Fee:	0.00	No. of Installments:	10
Financed Broker Fee:	0.00	Installment Amount:	1,884.34

Submit Edit Close Payment Option

On Line Account Submission Process

Customer Name:	RVN Technologies	Total Account:	21,600.00
Interest Charge Total Due:	915.40	Amount of Deposit:	3,672.00
Term:	10	Amount of Installments:	1,884.34

Ensure you have a signed contract and customer banking information before submitting.

Is your Brokerage keeping the down payment? Yes No

Confirm down payment and any additional retained amounts

Note: If you are not collecting the down payment the Brokerage is still responsible for time on risk.

Additional amount retained by the brokerage:*

* If applicable, enter the dollar amount that the broker has retained in addition to the down payment amount.

Complete Cheque Information:

Enter insured's banking info

Account Holder Name:	RVN Technologies
Institution Number:	004
Financial Institution Name:	TD Canada Trust
Bank Transit:	47836
Account Number:	1234567

Cheque Sample



Upload image of signed Payment Options Form

Choose file

Upload signed Premium Finance Agreement and VOID cheque

Files
cheque image_2015_2.jpg (642KB) [remove](#)

or check here The signed Payment Options Form will be emailed to clientservices@firstinsurancefunding.ca or faxed to 888 232 2209.

Account Submission Note:

(Optional) If you have any special instructions, enter a Loan Submission Note

A note is only necessary if you would like to communicate something specific about this contract to the FIRST Insurance Funding service team.

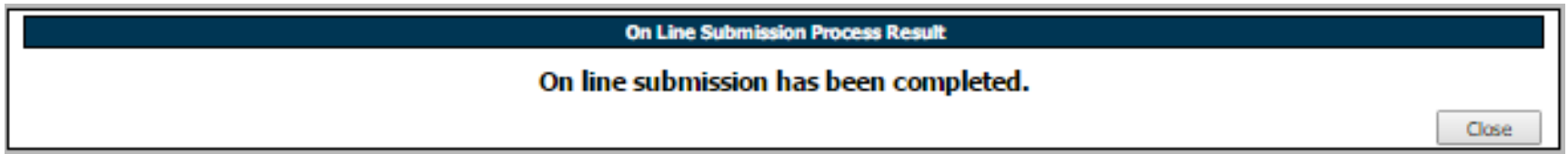
AGENT OR BROKER REPRESENTATIONS No need to sign, email, fax; simply click to agree

By selecting 'Complete On Line Submission' you warrant and agree to the Agent or Broker Representations as outlined in the contract. You further agree that the brokerage has been furnished with these representations and you have the authority to submit this contract and agree to the representations.

You further warrant that the Brokerage has collected the down payment, if applicable, and any other sums due as required by the agreement and is holding same or they are remitted with this agreement.

Click **Complete** On Line Submission

- › Receive confirmation that your contract has been submitted for processing



Tips



1. Your login is now your email address
2. Login credentials will be emailed to you within 5 business days from training.
3. Access to old quoting system for existing loan management only
 - endorsements, funding inquiries, notices, etc.
4. Renewals will be available in the new system
5. Training guides, videos, FAQs, webinars available on our website – Visit First InSite Enhanced tab

Contact Us

Contact a member of your dedicated service and support team with any questions or you can reach us at:

clientservices@firstinsurancefunding.ca

1 888 232 2238