

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

First InSite Lite

Renewals

Renewals

Topics covered in this guide:

1. Renewals
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

Login here

First InSite **First InSite Enhanced**

in Twitter Email G+
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English Français

FIRST INSURANCE
OF CANADA FUNDING
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First InSite

Broker Login

User Name: sarah.smth@bestinsurance.ca
Password: *****

Forgot Password

Renewals

The screenshot shows the 'Renewals' section of the FirstInSite Lite application. At the top, there is a header bar with 'Currency: CAD' and a Canadian flag icon on the left, and 'Français' and a 'Logout' button on the right. Below this is a navigation menu with 'Quotes', 'Renewals' (highlighted), 'Accounts', and 'Contact Us'. The main content area features a search box titled 'Search for a renewal'. It contains two input fields: 'Name' and 'Account Number', followed by a 'Search >' button.

- › Click on Renewals in the top menu bar
- › Search for a renewal by entering your clients and/or account number

Renewals

Search for a renewal

Name

Account Number

Search >

Account Number	Creation Date	Name	Broker Contact	Renew
71706		Regional 1 Airlines Ltd.		Renew
149491		Ensign Energy Services Inc.		Renew
120312		Nextraction Energy Corporation		Renew
77190		DAC Aviation International Ltée		Renew
935	13/02/2017	Bob Smith	Jennifer Davis	Renew

5 items

- > List of relevant accounts up for renewal will appear. Locate the account you wish to action and click **Renew**

- › The information from last year's contract will populate
- › Review and update client information, if necessary

Renewals

Type	Contract	Line of Business
Quote	Regular ▼	Commercial ▼

Client

Company Name	Document Language		
Nextraction Energy Corporation	English ▼		
Contact Name	Broker Reference ⓘ		
Kent Edney	00000		
Address			
254 – 250 6th Avenue SW PO Box 20004 Bow Valley			
City	Province	Postal Code	Country
Calgary	AB ▼	T2P 4H3	Canada
Email	Phone Number		
test@policybill.com	416-555-1234		

- › Update the premium and policy details, if necessary
- › Enter the effective date
- › Add another policy, if necessary
- › Click **Continue**

Total Financing Contract

Premium	Taxes	Policy Fees	Total Premium	Contract Effective Date
15,092.00	0.00	0.00	15,092.00	15/08/2017
Financed Broker Fees	Nonreimbursable Broker Fees	Total Payable	Minimum Earned Premium	
0.00	0.00	15,092.00	0.00	0.000 %

Policy

Policy Number	Effective Date	Coverage Type	Policy Terms
tba	15/08/2017	PACKAGE	12 Months
Carrier	MGA		
Chubb Insurance - TOR	Totten Insurance Group - Toronto		

Premium	Taxes	Policy Fees	Total Premium	Minimum Earned Premium
7,882.00	0.00	0.00	7,882.00	0.00 0.000 %

Policy

Policy Number	Effective Date	Coverage Type	Policy Terms
TBD	15/08/2017	-- Select One --	12 Months
Carrier	MGA		
Aviva Canada - TOR	HUB International Ontario Ltd.		

Premium	Taxes	Policy Fees	Total Premium	Minimum Earned Premium
7,210.00	0.00	0.00	7,210.00	0.00 0.000 %

[Add another policy](#)

Cancel
Continue

> Select the **pricing program**

> Edit the **down payment**, if necessary

> Edit the **installment date**, if necessary

> Click **Create Payment Options** or **Process Renewal**

Renewals

Terms and Pricing Programs

12 Equal Installments

17% Down, 10 Installments

20% Down, 9 Installments

Personal - 17/10, GN, 30 Days

Financials

APR	<input type="text" value="13.489 %"/>	
Flet Rate	<input type="text" value="5.218 %"/>	
Total Premium	<input type="text" value="15,092.00"/>	
Down payment	<input type="text" value="2,565.64"/>	<input type="text" value="17.000 %"/>
Amount Financed	<input type="text" value="12,526.36"/>	
Finance Charge	<input type="text" value="787.44"/>	
Total Payments	<input type="text" value="13,313.80"/>	
Number of Installments	<input type="text" value="10"/>	
Installment Amount	<input type="text" value="1,331.38"/>	First Installment Date <input type="text" value="15/09/2017"/>

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[Create Payment Options](#) [Process Renewal](#)

Processing Renewals

- › Enter any account submission notes you wish us to be aware of.
- › Click to acknowledge the broker representations
- › Click **Submit Renewal**

Account submission notes

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

Digital signature

Agent or Broker representations

By selecting "Submit Renewal" 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.

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Processing Renewals

Payment Options X

Invoice Payment Options


Insured: Nextraction Energy Corporation 254 – 250 6th Avenue SW PO Box 20004 Bow Valley Calgary, AB T2P 4H3 Tel:(416) 555-1234	Policy Payments ID 6031 Account No. 00000 Invoice Date July 05, 2017 Balance Due \$15,092.00 Currency \$USD
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So as not to affect your coverage please return payment or notify your broker that you wish to renew your monthly pay plan. Please mail to:
Best Insurance Brokers Inc. - Ottawa
123 Second Street
Ottawa, ON M1M 2N2

A. Payment in full
Send cheque or money order for \$15,092.00. Make all cheques payable to Best Insurance Brokers Inc. - Ottawa. Payment is due the effective date of the insurance coverage.

B. Monthly Installments

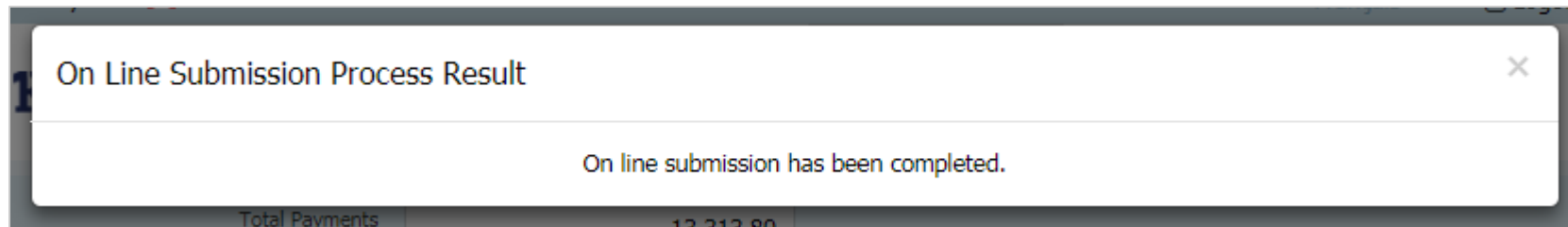
TOTAL PREMIUMS INCL. TAX	DOWN PAYMENT	10 INSTALLMENTS OF	FINANCE CHARGE	FLAT RATE*
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Print

- › Click print to print or save or x window to close

Processing Renewals

- › Upon closing the Payment Options window, you will receive a confirmation message that your on line submission has been completed



Tips

1. Your login is the same as First InSite Enhanced (your email address). If you're a new user, your login credentials will be emailed to you within 5 business days of training
2. Replace any existing bookmarks with this URL: <https://ficdn.first-quotes.com/Login>
3. Access to old quoting system for existing loan management only
 - endorsements, funding inquiries, notices, etc.
4. Renewals from the old system and First InSite Enhanced are available in the new system
5. Training guides, videos, and FAQs are available on our website – Visit First InSite Lite 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