



FIRST INSURANCE®
— OF CANADA — FUNDING
A WINTRUST COMPANY

FirstInSite Lite™
Additional Premium Quotes



Topics covered in this guide

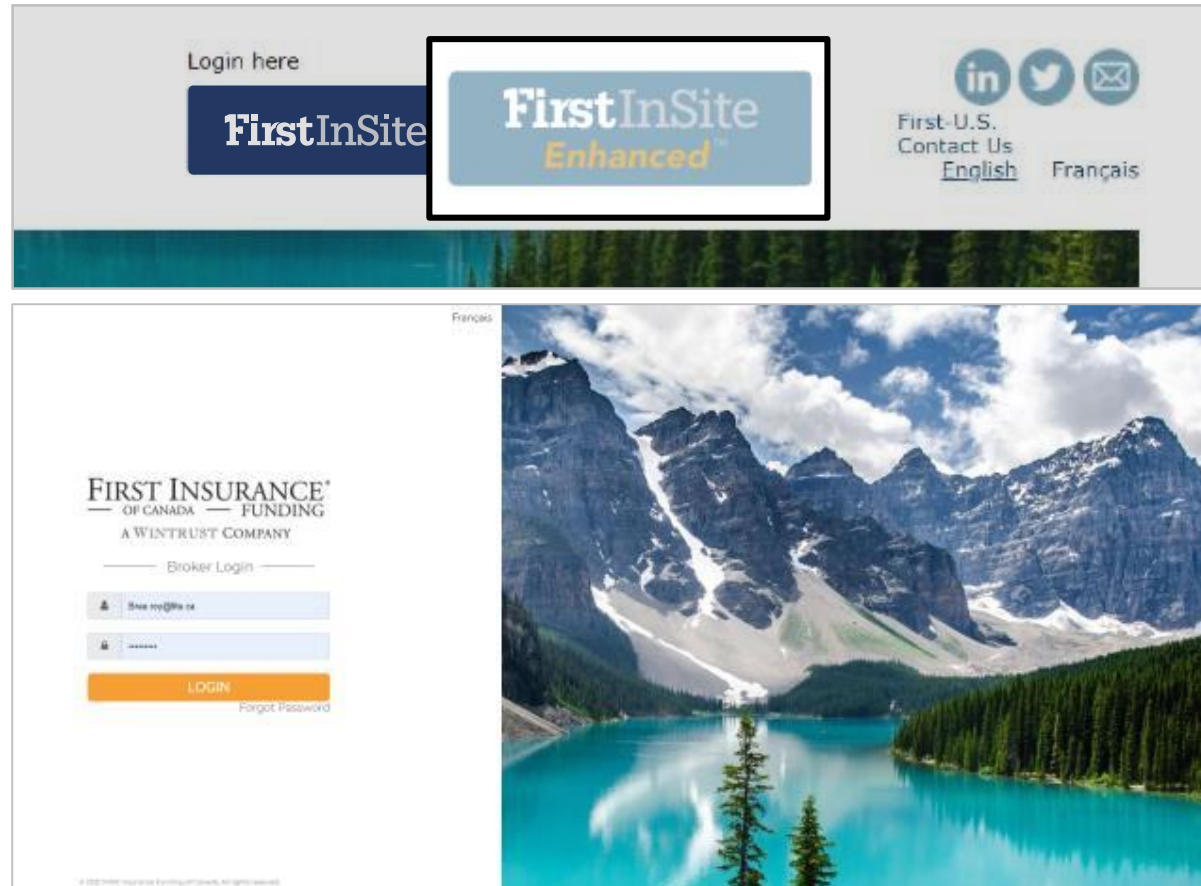
- › New Additional Premium Quotes
- › Existing Additional Premium Quote
- › Additional Premium Quote Search
- › Tips



FirstInSite Lite™

Log in to First InSite Lite™

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





Additional Premium Quotes

Additional Premium – Quotes

- › Click on **Additional Premium** in the menu

The screenshot displays the FirstInSite Lite website interface. At the top, there is a header with 'Currency: CAD' and a Canadian flag icon, 'Français', and a 'Logout' link. Below this is a navigation bar with the 'FirstInSite Lite' logo and menu items: 'Quotes', 'Renewals', 'Accounts', 'Additional Premium', and 'Contact us'. The main content area features a scenic background image of a mountain range and a lake. Two prominent boxes are overlaid on the image: 'Quick Search' and 'Quick Links'. The 'Quick Search' box contains two search fields: 'Quote Search' and 'Account Search', each with a magnifying glass icon. The 'Quick Links' box contains two buttons: 'New Quote' with a plus sign icon and 'Renewal' with a circular arrow icon. Below these boxes is a grey bar with the text 'We're here to help.' and contact information: '1 888 232 2238' and 'clientservices@firstinsurancefunding.ca'. At the bottom, there is a footer with links for 'Privacy', 'Terms', 'Security', 'Support', and 'FAQ', and a small copyright notice: '© FIRST Insurance Funding of Canada. All rights reserved.'

Additional Premium – Quotes

- › To create a new AP Quote, click **Start** under Create a New AP Quote

The screenshot displays the 'Additional Premium' section of the FirstInSite Lite website. The page features a navigation bar with the logo and menu items: Quotes, Renewals, Accounts, Additional Premium (highlighted), and Contact us. The main content area is divided into two columns. The left column, titled 'Create a New AP Quote', contains an icon representing a person, a list, and a dollar sign with a plus sign, and a 'Start >' button. The right column, titled 'Search for an AP Quote', contains two input fields labeled 'Name' and 'AP Quote Number', and a 'Search >' button. At the bottom, a grey box provides contact information: 'We're here to help.' with phone number '1 888 232 2238' and email 'clientservices@firstinsurancefunding.ca'. The footer includes links for Privacy, Terms, Security, Support, and FAQ, and a copyright notice for First Insurance Funding of Canada.

Additional Premium – Quotes

- › Select your client by entering the client criteria and click **Search**

The screenshot displays the user interface of the FirstInSite Lite web application. At the top, the currency is set to CAD with a Canadian flag icon, and there are links for 'Français' and 'Logout'. The main navigation bar includes the 'FirstInSite Lite' logo and menu items for 'Quotes', 'Renewals', 'Accounts', 'Additional Premium' (which is highlighted), and 'Contact us'. The central focus is a 'Search for a Client' form with two input fields: 'Name' and 'Account Number'. A 'Search' button with a right-pointing arrow is positioned to the right of the 'Account Number' field. Below the search form, a grey box contains the text 'We're here to help.' followed by a phone icon and the number '1 888 232 2238', and an email icon and the address 'clientservices@firstinsurancefunding.ca'. The footer features a row of links: 'Privacy', 'Terms', 'Security', 'Support', and 'FAQ'. At the very bottom, a small copyright notice reads '© FIRST Insurance Funding of Canada. All right reserved.'

Additional Premium – Quotes

- › Click on the account you want to create the AP for

The screenshot shows the FirstInSite Lite website interface. At the top, there is a navigation bar with the logo, currency (CAD), language (Français), and a Logout link. Below the navigation bar is a search section titled "Search for a Client" with input fields for Name and Account Number, and a Search button. Below the search section is a table of client information.

Account Number	Name	Address	City	Region	Broker Contact
45203	Advantage Air-tech	3658 Tycos Dr	Toronto	ON	Kevin Shisler
45203	Crown Industries	1021 Findlay Creek Roa	Creston	BC	Stephanie Tidwell
45203	Connect Test	181 Hardy Street	Kelowna	BC	Brian D Johnson
45203	Knight Radiant	3411 Weir Crescent	Toronto	ON	Louis Norman
45203	C-Rating AP Test	1090 Victoria Park Ave	Toronto	ON	Seth Harris
45203	Agent Agency	2257 Eglinton Avenue	Toronto	ON	Todd Phelps

500 items

The number of results found is too large and has been limited to the first 500 results. Please refine your search in order to get fewer results.

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Add New AP Policy Quote

- › To quote a new policy click on **Add New Policy**

Currency: CAD **1-1** Français R. Logout

FirstInSite Lite™ Quotes Renewals Accounts **Additional Premium** Contact us

Account Number 45203 - ABC Company

Policy List

[Add New Policy](#) [Add Premium to Existing Policy](#) X

Policy Number: 11111	Loan: Original Loan	Effective Date: 03/12/2018 (12 months)	Premium: 50,000.00	Coverage: CRM - CRME	Insurance Carrier: C0004 - Royal and Sun Alliance	MGA: [Unspecified]
Policy Number: 32322	Loan: Original Loan	Effective Date: 03/12/2018 (12 months)	Premium: 100,000.00	Coverage: EQ - EARTHQUAKE	Insurance Carrier: C0006 - Zurich Toronto	MGA: [Unspecified]
Policy Number: 33333	Loan: Original Loan	Effective Date: 03/12/2018 (12 months)	Premium: 25,000.00	Coverage: LIAB - LIABILITY	Insurance Carrier: C0002 - Aviva Canada	MGA: [Unspecified]
Policy Number: 44444	Loan: Original Loan	Effective Date: 03/12/2018 (12 months)	Premium: 50,000.00	Coverage: CRM - CRME	Insurance Carrier: C0004 - Royal and Sun Alliance	MGA: [Unspecified]
Total Premium:			225,000.00			

4 Items << 1 >>

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Add New AP Policy

- › Enter the policy details for the endorsement
- › Click **Calculate**
- › The Financials section will populate based on the information you entered
- › Edit the down payment dollar amount or percentage, if necessary
- › Edit the first installment due date, if desired

The screenshot shows the 'AP Quote Details' and 'Financials' sections of a web application. The 'AP Quote Details' section includes fields for Broker (Best Insurance Broker Inc.), Client (Great Client), AP Quote Number, AP Quote Date (06/03/2023), and Account Number (10198). The 'Policy' section includes fields for Policy Number (1234567), Effective Date (24/03/2023), Coverage Type (AUTO FLEET), Policy Term (12 Months), Carrier (Auto Canada Inc.), and RGA. The 'Financials' section displays a table of values: Premium (25,000.00), Taxes (8.00), Policy Fees (9.00), Total Premium (25,000.00), Minimum Earned Premium (0.00, 0.00%), APR (7.99%), Flat Rate (4.59%), Total Premium (25,000.00), Down Payment (4,750.00, 17.99%), Amount Financed (20,750.00), Finance Charge (2,451.32), Total Payments (23,401.32), Number of Installments (8), First Payment Due Date (11/05/2023 | Max), and Installment Amount (2,825.19). Buttons for 'Add Another Policy', 'Add Premium to Existing Policy', 'Calculate', 'Save', and '< Back' are visible.

Country: CAN | FR | Logout

FirstInSiteLife® Quotes Renewals Accounts Additional Premium Contact us

AP Quote Details

Broker Best Insurance Broker Inc. 4450 Second Street, Ottawa, ON, K2H 2B7	Client Great Client 123 Any Street, Toronto, ON, M1A 1A1	
AP Quote Number	AP Quote Date 06/03/2023	Account Number 10198

Policy

Policy Number 1234567	Effective Date 24/03/2023	Coverage Type AUTO FLEET	Policy Term 12 Months	
Carrier Auto Canada Inc.	RGA - Select One -			
Premium 25,000.00	Taxes 8.00	Policy Fees 9.00	Total Premium 25,000.00	Minimum Earned Premium 0.00 0.00%

[Add Another Policy](#) [Add Premium to Existing Policy](#) [Calculate](#)

Financials

APR	7.99 %	
Flat Rate	4.59 %	
Total Premium	25,000.00	
Down Payment	4,750.00 17.99 %	
Amount Financed	20,750.00	
Finance Charge	2,451.32	
Total Payments	23,401.32	
Number of Installments	8	First Payment Due Date 11/05/2023 Max
Installment Amount	2,825.19	

[Save](#)

[< Back](#) [Print](#) [Cancel](#)

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Add New AP Policy

- › Click the **Add Another Policy Button** to add another policy, if necessary
- › If you edit or add additional policies, click **Recalculate** to update the Financials
- › Review the Financials summary
- › Edit the down payment dollar amount or percentage, if necessary
- › Review all details are correct
- › Click **Save**

The screenshot displays the 'FirstInSite Lite' web application interface. At the top, there are navigation links for 'Quotes', 'Renewals', 'Accounts', 'Additional Premium', and 'Contact us'. The main content area is titled 'AP Quote Details' and includes fields for 'Broker' (East Insurance Broker Inc.), 'Client' (Great Client), 'AP Quote Number', 'AP Quote Date' (08/01/2021), and 'Account Number' (18189).

Below this, there are two 'Policy' sections. The first policy has a 'Policy Number' of 22343867, an 'Effective Date' of 08/01/2021, 'Coverage Type' of AUTO FLEET, and 'Policy Terms' of 12 Months. The second policy has a 'Policy Number' field, an 'Effective Date' field, 'Coverage Type' of --Select One--, and 'Policy Terms' of 6 Months.

At the bottom of the policy sections, there are buttons for 'Add Another Policy', 'Add Premium to Existing Policy', and 'Recalculate'.

The 'Financials' section shows a summary of costs and payments:

APR	7.88 %
Fat Rate	4.19 %
Total Premium	35,000.00
Down Payment	4,200.00 (12,000 %)
Amount Financed	30,750.00
Finance Charge	2,851.52
Total Payments	33,401.52
Number of Installments	6
First Payment Due Date	11/09/2021 - Mon
Established Amount	2,823.18

At the bottom right, there is a 'Save' button. At the bottom left, there is a '< Back' button. At the bottom right, there are 'Print' and 'Refresh' buttons.

Add New AP Policy

- › Click **Print** to print and send a copy to your client or click **Submit** to continue

The screenshot displays the 'FirstInSite Lite' web application interface. At the top, there is a navigation bar with 'Quotes', 'Renewals', 'Accounts', 'Additional Premium', and 'Contact us'. The main content area is divided into three sections: 'AP Quote Details', 'Policy', and 'Financials'.

AP Quote Details:

Broker	Client
Best Insurance Broker Inc. 4450 Second Street, Ottawa, ON, K2H 2B7	Great Client 123 Ave Street, Toronto, ON, X2X 1X3

AP Quote Number:
AP Quote Date: 06/03/2021
Account Number: 10099

Policy:

Policy Number	Effective Date	Coverage Type	Policy Term
1234567	24/03/2021	AUTO FLEET	12 Months

Carrier: Aviva Canada Inc. | MG: --Select One--

Premium	Taxes	Policy Fees	Total Premium	Minimum Earned Premium
25,000.00	0.00	0.00	25,000.00	0.00 / 0.00%

Buttons: Add Another Policy, Add Premium to Existing Policy, Recalculate

Financials:

APR	7.89 %
Flat Rate	4.59 %
Total Premium	25,000.00
Down Payment	4,200.00 (17.00 %)
Amount Financed	20,790.00
Finance Charge	2,461.52
Total Payments	23,461.52
Number of Installments	8
First Payment Due Date	11/05/2021 Mar
Installment Amount	2,932.70

Buttons: < Back, Print, Submit

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Submit New AP Policy

- › Indicate who is collecting the down payment and any additional amount retained by the brokerage, if applicable
- › Enter any additional notes, if necessary
- › Click **Submit** to submit the AP quote for conversion

Currency: CAD Français Logout

FirstInSite^{Lite} Quotes Renewals Accounts Additional Premium Contact us

AP Quote Details

Broker: Best Insurance Broker Inc. 4450 Sheppard Avenue East, #200, Scarborough, ON M1S 1T7
Client: Great Client 123 Ave Street, Toronto, ON, M1X 1A1

AP Quote: 123456789

Policy: 123456789

Confirmation: 123456789

Premium: 25,000.00

AP Quote Details

Confirm

Additional Premium \$0000.00
Down Payment \$0000.00

Who is collecting the down payment?
 FIRST Canada
 Broker

Enter any additional amount retained by the brokerage \$

Submission Notes (optional)

Acknowledge

I hereby authorize FIRST Insurance Funding of Canada to process an endorsement in accordance with the above information and further accept this as an acknowledgement that we have notified the Insured that this amendment forms part of the original Premium Finance Agreement and that we are bound by the terms and conditions thereof.

Important - Please ensure that your client is aware of this adjustment as it will be processed by FIRST Insurance Funding of Canada upon receipt and acceptance of request.

Cancel Submit

Total Premium	25,000.00	
Down Payment	4,250.00	17.00 %
Amount Financed	20,750.00	
Finance Charge	2,651.52	
Total Payments	23,401.52	
Number of Installments	8	First Payment Due Date 11/05/2021 Max
Installment Amount	2,925.19	

Save

< Back Print Submit

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Privacy Terms Security Support FAQ

Confirmation of New AP Policy

- › A confirmation window will appear to confirm that your AP quote was successfully submitted

The screenshot displays the FirstInSite Lite web application interface. A white confirmation modal is centered on the screen, displaying the message: "Your AP Quote submission was successful." with a "Close" button. The background shows the "AP Quote Details" section with various input fields and a "Financials" table.

AP Quote Details

Broker: Best Insurance Broker Inc. 4490 Sheppard Street, Toronto, ON M2N 3K7
Client: Great Client 123 Any Street, Toronto, ON M1A 1A1

AP Quote: [Input Field]

Policy Number: 12345667 | Effective Date: 24/03/2021 | Coverage Type: AUTO FLEET | Policy Terms: 12 Months

Carrier: Aviva Canada Inc. | MGA: --Select One--

Premium: 25,000.00 | Taxes: 0.00 | Policy Fees: 0.00 | Total Premium: 25,000.00 | Minimum Earned Premium: 0.00 (0.00%)

Buttons: Add Another Policy, Add Premium to Existing Policy, Recalculate

Financials

APR	7.89 %
Flat Rate	4.59 %
Total Premium	25,000.00
Down Payment	4,250.00 (17.00 %)
Amount Financed	20,750.00
Finance Charge	2,651.52
Total Payments	23,401.52
Number of Installments	8
First Payment Due Date	11/09/2021 : Max
Instalment Amount	2,925.19

Buttons: Save, < Back, Print, Submit

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Add AP to Existing Policy

- › To add premium to an existing policy, select the policy from the grid list

Agency: CMI **1-1** Francoise R. Logout

FirstInSite Lite™ Quotes Renewals Accounts Additional Premium Contact us

Account Number 45203 - ABC Company

Policy List

Add New Policy Add Premium to Existing Policy X

Policy Number: 11111	Loan: Original Loan	Coverage: CRD - CRDHE
Effective Date: 03/12/2018 (12 months)	Insurance Carrier: C0004 - Royal and Sun Alliance	MGA: (Unspecified)
Premium: 50,000.00		
Policy Number: 22222	Loan: Original Loan	Coverage: EQ - EARTHQUAKE
Effective Date: 03/12/2018 (12 months)	Insurance Carrier: C0006 - Zurich Toronto	MGA: (Unspecified)
Premium: 100,000.00		
Policy Number: 33333	Loan: Original Loan	Coverage: LIAB - LIABILITY
Effective Date: 03/12/2018 (12 months)	Insurance Carrier: C0002 - Aviva Canada	MGA: (Unspecified)
Premium: 25,000.00		
Policy Number: 44444	Loan: Original Loan	Coverage: CRD - CRDHE
Effective Date: 03/12/2018 (12 months)	Insurance Carrier: C0004 - Royal and Sun Alliance	MGA: (Unspecified)
Premium: 50,000.00		
Total Premium: 225,000.00		

4 items « | 1 | »

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Add AP to Existing Policy

- › Add the effective date, premium amount, fees, taxes and minimum retained, if applicable.
- › Click **Calculate**
- › The Financials section below will update based on the policy details entered

The screenshot displays the 'FirstInSite Lite' web application interface. At the top, there are navigation tabs: Quotes, Renewals, Accounts, **Additional Premium**, and Contact Us. The user is logged in as 'J. Light'.

AP Quote Details:

Broker: Best Insurance Broker Inc., 4495 Second Street, Ottawa, ON, K1M 2P7	Client: Great Client, 123 Any Street, Toronto, ON, M1A 1A1	
AP Quote Number: [input field]	AP Quote Date: 08/15/2021	Account Number: 1099

Policy:

Policy Number: 1234567	Effective Date: 24/05/2021	Coverage Type: APD ALEBT	Policy Term: 22 Months				
Carrier: Ariva Canada Inc.	MSA: [input field]	Premium: 25,000.00	Tax: 0.00	Policy Fees: 0.00	Total Premium: 25,000.00	Minimum Earned Premium: 0.00	0.00%

Buttons: Add Another Policy, Add Premium to Existing Policy, **Calculate**

Financials:

APR	7.85 %	
Flat Rate	4.34 %	
Total Premium	25,000.00	
Down Payment	4,200.00	17.00 %
Amount Financed	20,790.00	
Finance Charge	2,435.52	
Total Payments	23,465.52	
Number of Installments	6	First Payment Due Date: 11/05/2021 Rec: [dropdown]
Installment Amount	3,910.92	

Buttons: Save, Back, Print, Submit

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Add AP to Existing Policy

- › If you need to add a another new AP policy click **Add Premium to Existing Policy**
- › Enter the additional AP Policy details
- › Click **Recalculate**

Currency: CAD Français Logout

FirstInSite Lite™ Quotes Renewals Accounts Additional Premium Contact us

AP Quote Details

Broker Best Insurance Broker Inc. 4490 Second Street, Ottawa, ON, K2H 3B7	Client Great Client 123 Any Street, Toronto, ON, X1X 1X1	
AP Quote Number	AP Quote Date	Account Number
<input type="text"/>	<input type="text" value="09/03/2021"/>	<input type="text" value="10199"/>

Policy

Policy Number	Effective Date	Coverage Type	Policy Terms	
<input type="text" value="12345667"/>	<input type="text" value="24/03/2021"/>	<input type="text" value="AUTO FLEET"/>	<input type="text" value="12"/> Months	
Carrier	MGA			
<input type="text" value="Aviva Canada Inc."/>	<input type="text"/>			
Premium	Taxes	Policy Fees	Total Premium	Minimum Earned Premium
<input type="text" value="25,000.00"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="25,000.00"/>	<input type="text" value="0.00"/> <input type="text" value="0.00%"/>

Policy

Policy Number	Effective Date	Coverage Type	Policy Terms	
<input type="text" value="12345667"/>	<input type="text"/>	<input type="text" value="AUTO FLEET"/>	<input type="text" value="12"/> Months	
Carrier	MGA			
<input type="text" value="Aviva Canada Inc."/>	<input type="text"/>			
Premium	Taxes	Policy Fees	Total Premium	Minimum Earned Premium
<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/> <input type="text" value="0.00%"/>

Financials

APR	<input type="text" value="7.89 %"/>
Flat Rate	<input type="text" value="4.59 %"/>
Total Premium	<input type="text" value="25,000.00"/>
Down Payment	<input type="text" value="4,250.00"/> <input type="text" value="17.00 %"/>
Amount Financed	<input type="text" value="20,750.00"/>
Finance Charge	<input type="text" value="3,651.52"/>
Total Payments	<input type="text" value="23,401.52"/>
Number of Installments	<input type="text" value="8"/> First Payment Due Date <input type="text" value="11/05/2021 : Max"/>
Installment Amount	<input type="text" value="2,925.19"/>

Add AP to Existing Policy

- › If you edit any policy or down payment information, click **Recalculate** to update the Financials
- › Review the Financials summary
- › Click **Save**

The screenshot displays the 'FirstInSite' web application interface for adding an Additional Premium (AP) to an existing policy. The page is titled 'AP Quote Details' and includes the following sections:

- AP Quote Details:** Fields for Broker (Best Insurance Broker Inc.), Client (Great Client), AP Quote Number, AP Quote Date (06/15/2021), and Account Number (12345).
- Policy:** Fields for Policy Number (LPW001), Effective Date (24/03/2021), Coverage Type (AUTO FLEET), Policy Term (12 Months), Carrier (Amica Canada Inc.), and Risk (NSA).
- Financials Summary:** A table showing Premium (25,000.00), Taxes (0.00), Policy Fees (0.00), Total Premium (25,000.00), and Minimum Earned Premium (0.00 @ 0.00%).
- Financials:** A detailed breakdown of costs including APR (7.00%), Flat Rate (4.34%), Total Premium (25,000.00), Earn Payment (4,700.00 @ 17.00%), Amount Premium (20,700.00), Finance Charge (2,491.51), Total Payments (23,461.51), Number of Installments (0), First Payment Due Date (12/03/2021), and Total Amount (0,000.00).

Buttons for 'Add Another Policy', 'Add Premium to Existing Policy', 'Recalculate', and 'Save' are visible. The footer includes contact information: 1 800 232 2238 and client.services@firstinsiteofindig.ca.

Add AP to Existing Policy

- › You can click **Print** to print and send a copy to your client or click **Submit** to continue

FirstInSite Lite Quotes Renewals Accounts Additional Premium Contact us

AP Quote Details

Broker	Client	
866 Insurance Broker Inc. 4430 Second Street, Ottawa, ON, K1H 3K7	Grid Client 123 4th Street, Toronto, ON, M1A 1A1	
AP Quote Number	AP Quote Date	Amount Number
	06/10/2021	10000

Policy

Policy Number	Effective Date	Coverage Type	Policy Term
1234567	2/15/2021	AGO FLEET	12 Months
Carrier	MSA		
Policy Company	Alico Canada Inc.		

Premium	Taxes	Policy Fees	Total Premium	Minimum Earned Premium
25,000.00	0.00	0.00	25,000.00	0.00 0.00%

[Add Another Policy](#) [Add Premium to Existing Policy](#) [Recalculate](#)

Financials

APR	7.00 %
Flat Rate	4.50 %
Total Premium	25,000.00
Down Payment	4,250.00 17.00 %
Amount Financed	20,750.00
Finance Charge	3,815.52
Total Payments	24,565.52
Number of Installments	12
First Payment Due Date	11/05/2021 (Mon)
Installment Amount	2,047.19

[Print](#)

[< Back](#) [Print](#) [Submit](#)

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Submit AP for Existing Policy

- › Indicate who is collecting the down payment and any additional amount retained by the brokerage, if applicable
- › Enter any additional notes, if needed
- › Click **Submit**

The screenshot displays the 'AP Quote Details' page in the FirstInSite Lite system. A 'Confirm' modal dialog is open, prompting the user to confirm the submission of an Additional Premium (AP) for an existing policy. The dialog includes the following information:

- Additional Premium:** \$0000.00
- Down Payment:** \$000.00

Below this, there is a section titled 'Who is collecting the down payment?' with two radio button options: 'FIRST Canada' (selected) and 'Broker'. There is also a text input field for 'Enter any additional amount retained by the brokerage' with a '\$' symbol, and a text area for 'Submission Notes (optional)'. An 'Acknowledge' section contains a paragraph of text and an 'Important' note. At the bottom of the dialog are 'Cancel' and 'Submit' buttons.

The background page shows the following details:

- Broker:** Best Insurance Broker Inc., 4490 Steeles Ave. East, Unit 100, Scarborough, ON M1S 1T7
- Client:** Great Client, 123 Ave Street, Toronto, ON, M1X 1X1

Total Premium	25,000.00	
Down Payment	4,250.00	17.00 %
Amount Financed	20,750.00	
Finance Charge	2,651.52	
Total Payments	23,401.52	
Number of Installments	8	First Payment Due Date: 11/09/2021 Max. ▼
Installment Amount	2,925.19	

At the bottom of the page, there is a 'We're here to help.' section with contact information: 1 888 232 2238 and clientservices@firstinsurancefunding.ca. The footer includes links for Privacy, Terms, Security, Support, and FAQ.

Confirmation of AP for Existing Policy

- › A confirmation window will appear to confirm that your AP quote was successfully submitted

The screenshot displays the FirstInSite Lite web application interface. At the top, there is a navigation bar with the logo and menu items: Currency: CAD, Quotes, Renewals, Accounts, Additional Premium, and Contact us. The main content area is titled "AP Quote Details" and shows a confirmation message: "Your AP Quote submission was successful." with a "Close" button. Below the message, there are fields for "Broker" (Best Insurance Broker Inc.) and "Client" (Great Client). The "AP Quote" section includes fields for "Policy Number" (12345667), "Effective Date" (24/03/2021), "Coverage Type" (AUTO FLEET), and "Policy Terms" (12 Months). The "Carrier" section shows "Aviva Canada Inc." and "MGA" (Select One). A summary table shows "Premium" (25,000.00), "Taxes" (0.00), "Policy Fees" (0.00), "Total Premium" (25,000.00), and "Minimum Earned Premium" (0.00, 0.00%). Below this are buttons for "Add Another Policy", "Add Premium to Existing Policy", and "Recalculate". The "Financials" section includes a table with fields for APR (7.89%), Flat Rate (4.59%), Total Premium (25,000.00), Down Payment (4,250.00, 17.00%), Amount Financed (20,750.00), Finance Charge (2,651.52), Total Payments (23,401.52), Number of Installments (8), and First Payment Due Date (11/05/2021). At the bottom, there is an "Installment Amount" field (2,925.19) and buttons for "Save", "Back", "Print", and "Submit". A footer section contains the text "We're here to help." and contact information: 1 888 232 2238 and clientservices@firstinsurancefunding.ca. The bottom-most footer includes links for Privacy, Terms, Security, Support, and FAQ.

Additional Premium – Quote Search

- › To search for an existing AP quote, enter in search criteria and click **Search**

The screenshot displays the 'Additional Premium' section of the FirstInSite Lite website. The page features a navigation bar with the logo and menu items: Quotes, Renewals, Accounts, Additional Premium (highlighted), and Contact us. The main content area is divided into two panels: 'Create a New AP Quote' with a 'Start' button, and 'Search for an AP Quote' with input fields for 'Name' and 'AP Quote Number', and a 'Search' button. A footer section provides contact information: 'We're here to help.' with phone number 1 888 232 2238 and email clientservices@firstinsurancefunding.ca. The bottom of the page includes links for Privacy, Terms, Security, Support, and FAQ, along with a copyright notice for First Insurance Funding of Canada.

Currency: CAD

Français Logout

FirstInSite Lite™

Quotes Renewals Accounts **Additional Premium** Contact us

Create a New AP Quote

Start >

Search for an AP Quote

Name

AP Quote Number

Search >

We're here to help.

1 888 232 2238 clientservices@firstinsurancefunding.ca

Privacy | Terms | Security | Support | FAQ

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Additional Premium – Quote Search

- › Click on the account to view the AP Quote

Currency: CAD Français Logout

FirstInSite Lite™ Quotes Renewals Accounts **Additional Premium** Contact us

Search for an AP Quote

Name AP Quote Number Search

AP Quote Number	Name	AP Quoted By	AP Quoted Date	Total Premium	Down Payment	Number of Installments	Number of Endorsements
45203	Advantage Air	Dan Lawrie	11/24/2020	16,243.20	1,243.20	10	4
45203	Crown Industries	Dan Lawrie	11/24/2020	5,000.00	432.00	12	6
45203	Connect Test	Marie Rosales	11/24/2020	13,180.00	2,636.00	12	3
45203	Knight Radiant	Marie Rosales	11/24/2020	175,000.00	35,000.00	10	7
45203	C-Rating AP Test	Dan Lawrie	11/23/2020	100,000.00	15,000.00	12	8
45203	Agent Agency	Marie Rosales	11/23/2020	7,085.36	1,417.36	10	6

500 items << 1 2 3 4 5 >>

The number of results found is too large and has been limited to the first 500 quotes.
Please refine your search in order to get fewer results.

We're here to help.

1 888 232 2238 clientservices@firstinsurancefunding.ca

[Privacy](#) | [Terms](#) | [Security](#) | [Support](#) | [FAQ](#)

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Additional Premium – Quote Search

- › You cannot edit an existing AP Quote
- › Click **Print** to print the quote to send to your client or **Submit** to continue

The screenshot displays the 'Additional Premium' section of the FirstInSite Lite web application. The interface is organized into several sections:

- AP Quote Details:** Includes fields for Broker (B&B Insurance Broker Inc.), Client (Great Client), AP Quote Number, AP Quote Date (06/30/2021), and Account Number (12345).
- Policy:** Features fields for Policy Number (1234567), Effective Date (04/01/2021), Coverage Type (ALFO PL557), Policy Term (12 Months), Carrier (Avalanche Canada Inc.), and Risk (NSA). It also shows Premium (25,000.00), Term (5.00), Policy Fees (9.00), Total Premium (25,009.00), and Minimum Earned Premium (9.00, 5.00%).
- Financials:** A table-like section showing APR (7.99%), Flat Rate (4.50%), Total Premium (25,009.00), Down Payment (4,250.00, 17.00%), Amount Financed (20,759.00), Finance Charge (3,811.52), Total Payments (21,491.52), Number of Installments (9), First Payment Due Date (11/05/2021), and Installment Amount (2,387.95).

Navigation and action buttons include '< Back', 'Print', 'Submit', 'Add Another Policy', 'Add Premium to Existing Policy', and 'Calculate'. A footer contains contact information: 'We're here to help. 1 888 232 2238 | client.services@firstinsurancefunding.ca' and a bottom bar with links for Privacy, Terms, Security, Support, and FAQ.

Submit Premium – Quote Search

- › Indicate who is collecting the down payment and any additional amount retained by the brokerage, if applicable
- › Enter any additional notes, if needed
- › Click **Submit**

Currency: CAD | FirstInSite Lite | Quotes | Renewals | Accounts | Additional Premium | Contact us

AP Quote Details

Broker
Best Insurance Broker Inc.
4490 Steeles Street, Pittsburg, ON, M2H 1B7

Client
Great Client
123 Any Street, Toronto, ON, M1X 1X1

Confirm

Additional Premium \$0000.00
Down Payment \$000.00

Who is collecting the down payment?
 FIRST Canada
 Broker

Enter any additional amount retained by the brokerage \$

Submission Notes (optional)

Acknowledge

I hereby authorize FIRST Insurance Funding of Canada to process an endorsement in accordance with the above information and further accept this as an acknowledgement that we have notified the Insured that this amendment forms part of the original Premium Finance Agreement and that we are bound by the terms and conditions thereof.

Important - Please ensure that your client is aware of this adjustment as it will be processed by FIRST Insurance Funding of Canada upon receipt and acceptance of request.

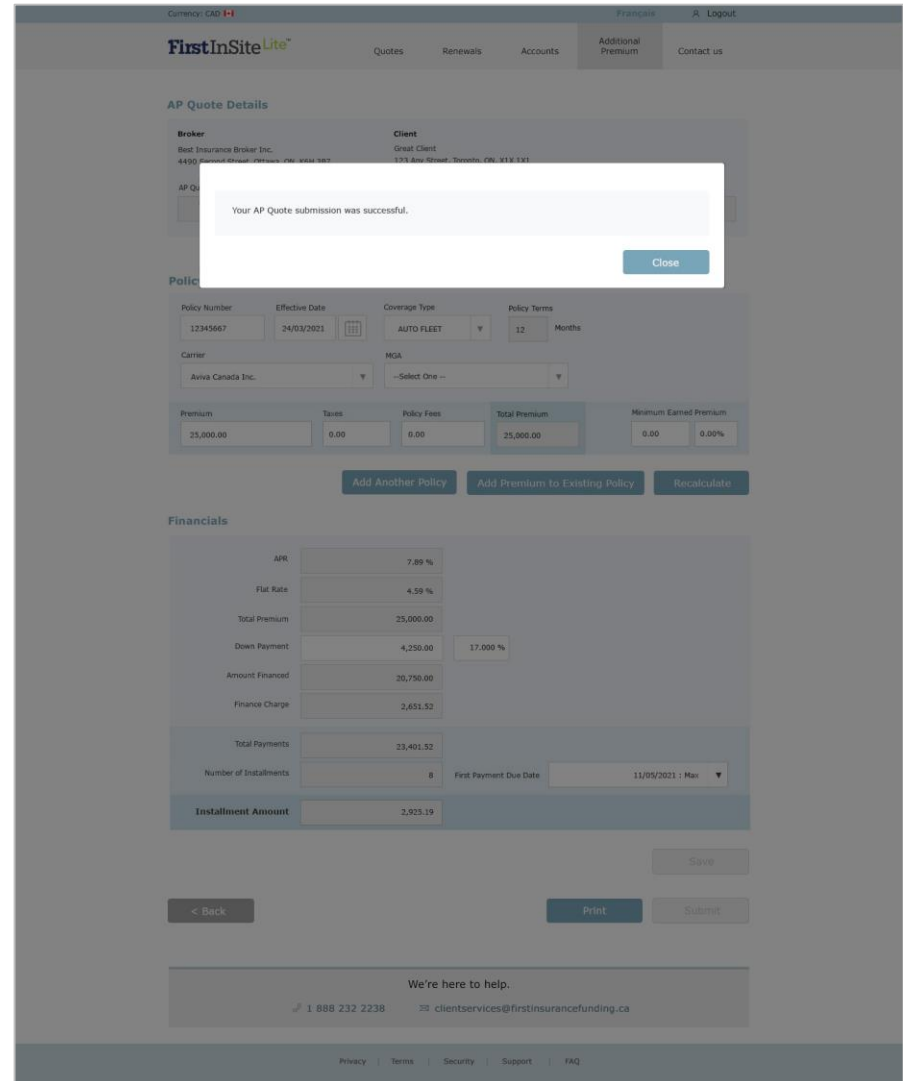
Total Premium	25,000.00	
Down Payment	4,250.00	17.00 %
Amount Financed	20,750.00	
Finance Charge	2,651.52	
Total Payments	23,401.52	
Number of Installments	8	First Payment Due Date 11/05/2021 Max
Installment Amount	2,925.19	

We're here to help.
1 888 232-2238 | clientservices@firstinsurancefunding.ca

Privacy | Terms | Security | Support | FAQ

Confirm Premium – Quote Search

- › A confirmation window will appear to confirm that your AP quote was successfully submitted



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. After initial login you will be required to create a password. This password must be 8 characters and include numbers, special characters, lower and upper case letters
3. Replace any existing bookmarks with this URL:
<https://ficdn.first-quotes.com/Login>
4. Training guides, videos, and FAQs are available on our website – Visit First InSite Lite™ tab

Contact us

1 888 232 2238

clientservices@firstinsurancefunding.ca

firstinsurancefunding.ca/contact-us