

FIRST INSURANCE®  
— OF CANADA — FUNDING  
A WINTRUST COMPANY

# First InSite

Loan Submission

# Topics Covered in this Manual:

1. Submitting the Loan

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# First InSite

Loan Submission



# Submitting the Loan

1. Login to [First Insite](#) - User Name and Password
2. Using the tabs at the top, select **Account Submission List**, locate the contract and click **Submit Account**

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| ID        | Date        | Brokerage                   | Internal ID | Customer Name        | Total Account | Status  | Action                         | IsRenew          | Type  | Portfolio |              |
|-----------|-------------|-----------------------------|-------------|----------------------|---------------|---------|--------------------------------|------------------|-------|-----------|--------------|
| 140000943 | 18-Sep-2014 | Best Insurance Brokers Inc. | BENGA1      | Advanced Composites  | \$20,000.00   | Pending | <a href="#">Submit Account</a> | Delete Duplicate | False | PQ        | FIRST Canada |
| 140000946 | 18-Sep-2014 | Best Insurance Brokers Inc. | JOESS-1     | Joe's Sports Shop    | \$21,708.00   | Pending | <a href="#">Submit Account</a> | Delete Duplicate | False | PQ        | FIRST Canada |
| 140000942 | 18-Sep-2014 | Best Insurance Brokers Inc. | JOESS-1     | Joe's Sports Shop    | \$21,708.00   | Pending | <a href="#">Submit Account</a> | Delete Duplicate | True  | PQ        | FIRST Canada |
| 140000941 | 18-Sep-2014 | Best Insurance Brokers Inc. | JOESS-1     | Joe's Sports Shop    | \$21,708.00   | Pending | <a href="#">Submit Account</a> | Delete Duplicate | False | PQ        | FIRST Canada |
| 140000935 | 18-Sep-2014 | Best Insurance Brokers Inc. | TBD         | McDonalds            | \$12,000.00   | Pending | <a href="#">Submit Account</a> | Delete Duplicate | False | PQ        | FIRST Canada |
| 140000933 | 17-Sep-2014 | Best Insurance Brokers Inc. | tba         | Shantef's shoe store | \$20,100.00   | Pending | <a href="#">Submit Account</a> | Delete Duplicate | False | PQ        | FIRST Canada |
| 140000931 | 17-Sep-2014 | Best Insurance Brokers Inc. | POPUL-1     | Care Car             | \$20,100.00   | Pending | <a href="#">Submit Account</a> | Delete Duplicate | False | PQ        | FIRST Canada |

# Submitting the Loan

**First InSite** [Change Password](#) [Help](#) [Logout](#) [Français](#)  
For help call 1-888-232-2238

Account #:  Customer Name:  Policy #:  [Search](#)

[Summary Dashboard](#) [Accounts](#) [New Quote](#) [Quote Requests](#) [Account Submission List](#)

### On Line Account Submission Process

|                            |                   |                         |             |
|----------------------------|-------------------|-------------------------|-------------|
| Customer Name:             | Joe's Sports Shop | Total Account:          | \$21,708.00 |
| Interest Charge Total Due: | \$651.24          | Amount of Deposit:      | \$5,100.00  |
| Term (months):             | 10 Months         | Amount of Installments: | \$1,725.92  |

Step 1 : On Line Account Submission Process

**3** [Save Insured Details](#)

Associated Brokerage Contact:

#### Insured Information

Industry Classification:

Internal Customer Id:  Note : Enter TBD for customer ID if not yet assigned.

Customer Name:

Legal Name:

Contact First Name:  Note : Enter brokers name if customer contact name is unknown.

Contact Last Name:

Mailing Address:

City:

Province:

Postal Code:

Country:

Language Preference:

Work Phone:

Mobile Phone:

Fax:

Email:

3. Complete any missing client contact information; click **Save Insured Details**

**NOTE:** if the insured's details are completed during quoting, this screen will not appear and you will go directly to Step 2 of the submission process

# Submitting the Loan

On Line Account Submission Process

|                            |                   |                         |             |
|----------------------------|-------------------|-------------------------|-------------|
| Customer Name:             | Joe's Sports Shop | Total Account:          | \$21,708.00 |
| Interest Charge Total Due: | \$651.24          | Amount of Deposit:      | \$5,100.00  |
| Term (months):             | 10 Months         | Amount of Installments: | \$1,725.92  |

[Back to Step 1](#)

Step 2 : Complete Policy Details

Add Policy / Broker Fee(s)

If applicable, enter amount of Broker Fee or Policy Fee associated with this contract:  
(Not included in the premium amounts)

If applicable, enter amount of Tax on Broker/Policy Fee(s)

Total Broker/Policy Fee(s) + Tax

[Cancel Submission](#)

Coverage Information

Add Policy Information Below

Add/Update Policy

Policy No:  AND/OR

Broker Reference:

Effective Date:

Expiry Date:

Coverage Type:

Premium Cost:

Taxes:

Minimum Earned Premium:  (\$ amounts earned when policy goes into effect)

Wholesaler:  OR

Carrier:

Additional days to cancel:

For Wholesaler Policies  
Please select all Insurance Companies. Quote process can only continue if percentage is 100%. Click (+) to complete entry.

| Carrier  | Amount                                | Percentage                         |   |
|--|---------------------------------------|------------------------------------|---|
| <input type="text" value="Aviva Canada"/>      | <input type="text" value="10000.00"/> | <input type="text" value="50.00"/> | <input type="button" value="-"/> Click (+) to add |
| <input type="text" value="Allianz (Toronto)"/> | <input type="text" value="10000.00"/> | <input type="text" value="50.00"/> | <input type="button" value="-"/> Click (+) to add |

Policy Premium Total:

**4** [Save Policy](#) [Cancel](#)

4. Complete Policy Details and click **Save Policy**. For MGA policies, enter the subscribing companies, clicking "+" after each entry

# Submitting the Loan

Summary Dashboard Accounts New Quote Quote Requests Account Submission List

### On Line Account Submission Process

|                            |                   |                         |             |
|----------------------------|-------------------|-------------------------|-------------|
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| Term (months):             | 10 Months         | Amount of Installments: | \$1,725.92  |

5 Step 1 Step 3

#### Step 2 : Complete Policy Details

**Add Policy / Broker Fee(s)**  
If applicable, enter amount of Broker Fee or Policy Fee associated with this contract:   
(Not included in the premium amounts)  
If applicable, enter amount of Tax on Broker/Policy Fee(s)   
Total Broker/Policy Fee(s) + Tax

| Coverage Information |                |  |             |            |   |
|----------------------|----------------|--|-------------|------------|---|
| Policy No            | Effective Date | Carrier &/or Wholesaler  | Premium     | Tax        |   |
| 12345                | 01-Nov-2014    | Strategic Underwriting Managers Inc. / Aviva Canada, Allianz (Toronto) | \$20,000.00 | \$1,600.00 | <a href="#">Edit</a> <a href="#">Delete</a> |

[Cancel Submission](#)

#### Add Policy Information Below

**Add/Update Policy**

Policy No:

Broker Reference:

Effective Date:

Expiry Date:

Coverage Type:

Premium Cost:

Taxes:

Minimum Earned Premium:  (\$ amounts earned when policy goes into effect)

Wholesaler:  OR

Carrier:

Additional days to cancel:

[Save Policy](#) [Cancel](#)

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- Once all coverage information has been entered, click **Step 3**

# Submitting the Loan

On Line Account Submission Process

|                            |                   |                         |             |
|----------------------------|-------------------|-------------------------|-------------|
| Customer Name:             | Joe's Sports Shop | Total Account:          | \$21,708.00 |
| Interest Charge Total Due: | \$651.24          | Amount of Deposit:      | \$5,100.00  |
| Term (months):             | 10 Months         | Amount of Installments: | \$1,725.92  |

Back to Step 2

### Step 3: Down Payment, Void Cheque and Account Submission

Your Brokerage is to keep the down payment?  Yes  No  
Note: If you are not collecting the down payment the Brokerage is still responsible for time on risk.

Additional amount retained by the brokerage: \*  **6**  
\* If applicable, enter the dollar amount that the broker has retained in addition to the downpayment amount.

Complete Void Cheque Information:

Financial Institution: 0004 - TD Canada Trust

12345 0004 1234567  
Bank Transit Institution Number Account Number

Commercial  Personal

Account Holder Name: Joe's Sports Shop

Canadian Check Sample

Upload image of signed Payment Options Form and Void Cheque

Browse... No file selected **8**  
PB\_140000938\_JOESS-1.pdf  
or check here  The signed Payment Options Form will be emailed to clientservices@firstinsurancefunding.ca or faxed to 1-800-232-2209.

Account Submission Note:  
Endorsement to follow

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 **10**  
By selecting "Complete On Line Submission" you understand 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 reflected in this agreement.

**11** Complete On Line Submission Cancel Submission

6. Confirm down payment and any additional retained amounts
7. Enter insured's banking information
8. Upload copy of the signed Premium Finance Agreement and VOID cheque
9. (Optional) If you have any special instructions, enter a Loan Submission Note
10. No need to sign, email, or fax; simply click to agree to the statement
11. Click **Complete On Line Submission**



# Submitting the Loan

12. Receive confirmation that your contract has been submitted for processing

The screenshot displays the First InSite user interface. At the top left is the logo "First InSite". To the right are links for "Change Password", "Help", "Logout", and "Français". Below these is the text "For help call 1-888-232-2238". A search bar contains fields for "Account #:", "Customer Name:", and "Policy #:", followed by a "Search" button. A navigation menu includes "Summary Dashboard", "Accounts", "New Quote", "Quote Requests", and "Account Submission List". The main content area features a confirmation message: "The contract has been submitted for processing. ID # 11677", where "ID # 11677" is circled in yellow. Below the message are two buttons: "Create a New Quote" and "Submit Another Account". The footer contains "Home | Terms & Conditions | Contact Us" and "© 2014 First Insurance Funding of Canada. All rights reserved."

# Contact Us

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

[clientservices@firstinsurancefunding.ca](mailto:clientservices@firstinsurancefunding.ca)

1 888 232 2238