FIRST INSURANCE®
OF CANADA — FUNDING
A WINTRUST COMPANY
FirstInSite Lite™
Renewals

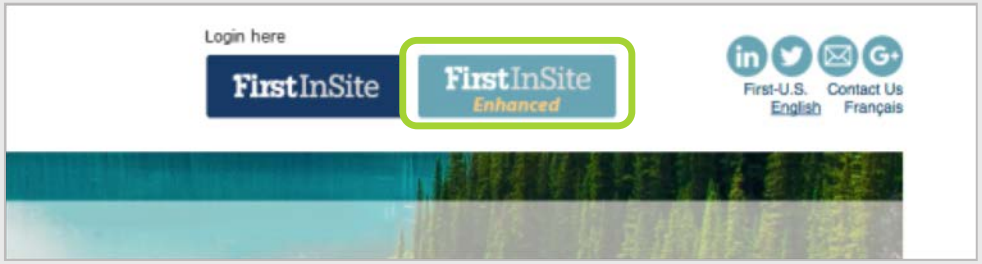
Renewals

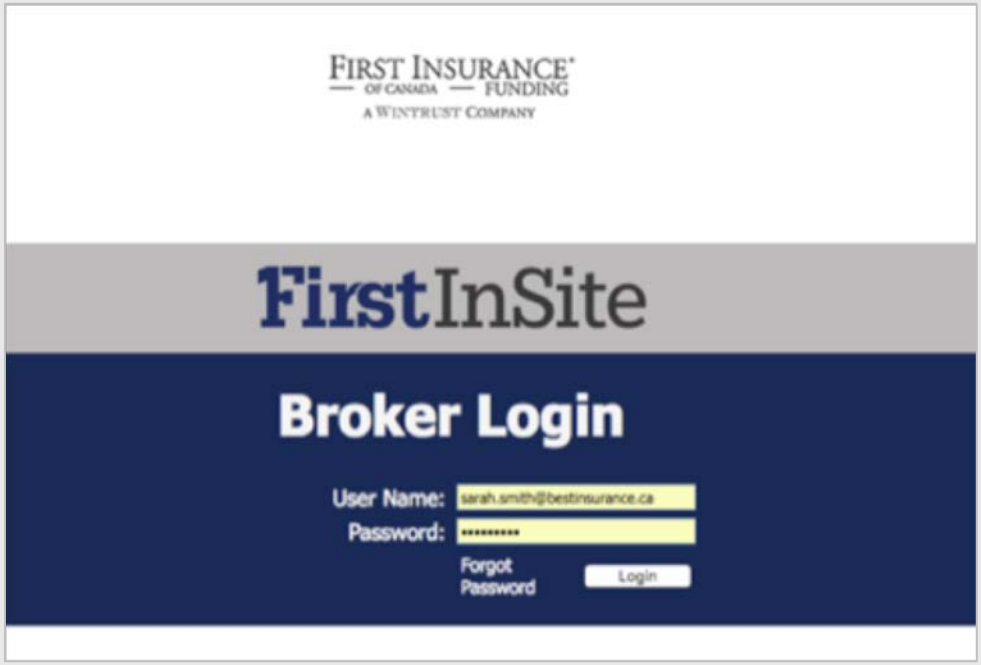
Topics covered in this guide:

1. Renewals
2. Tips

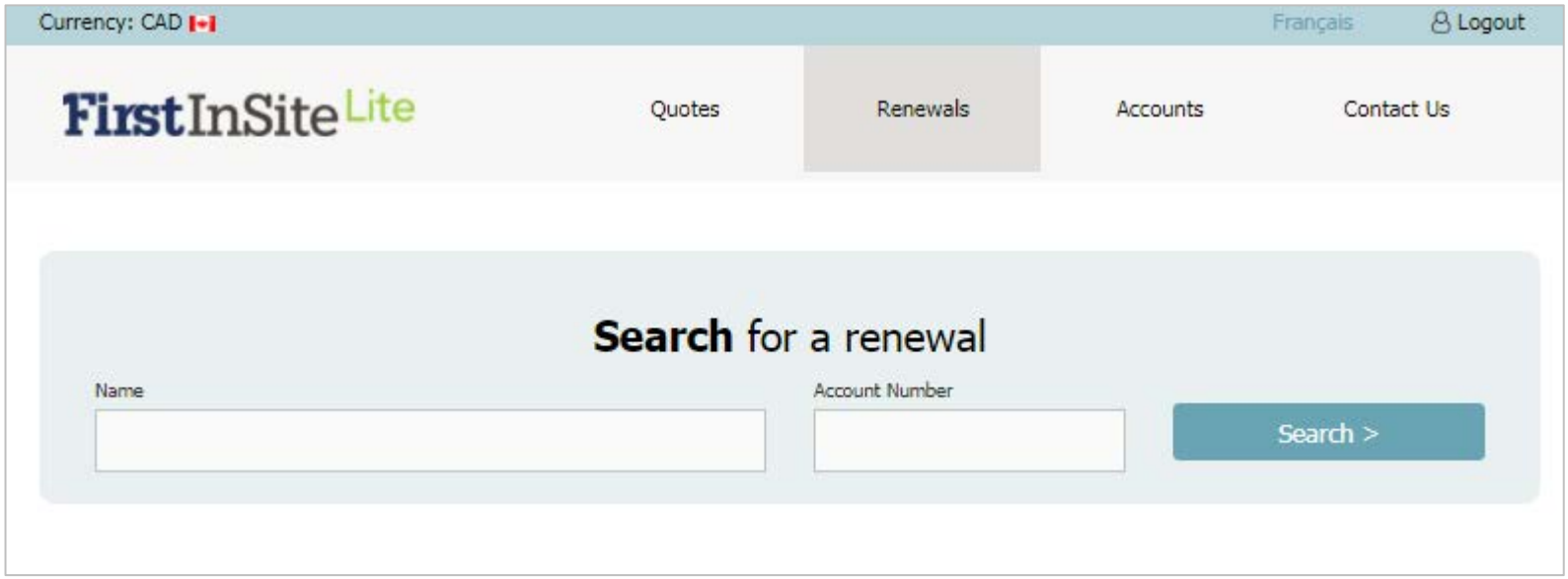
Login

- 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



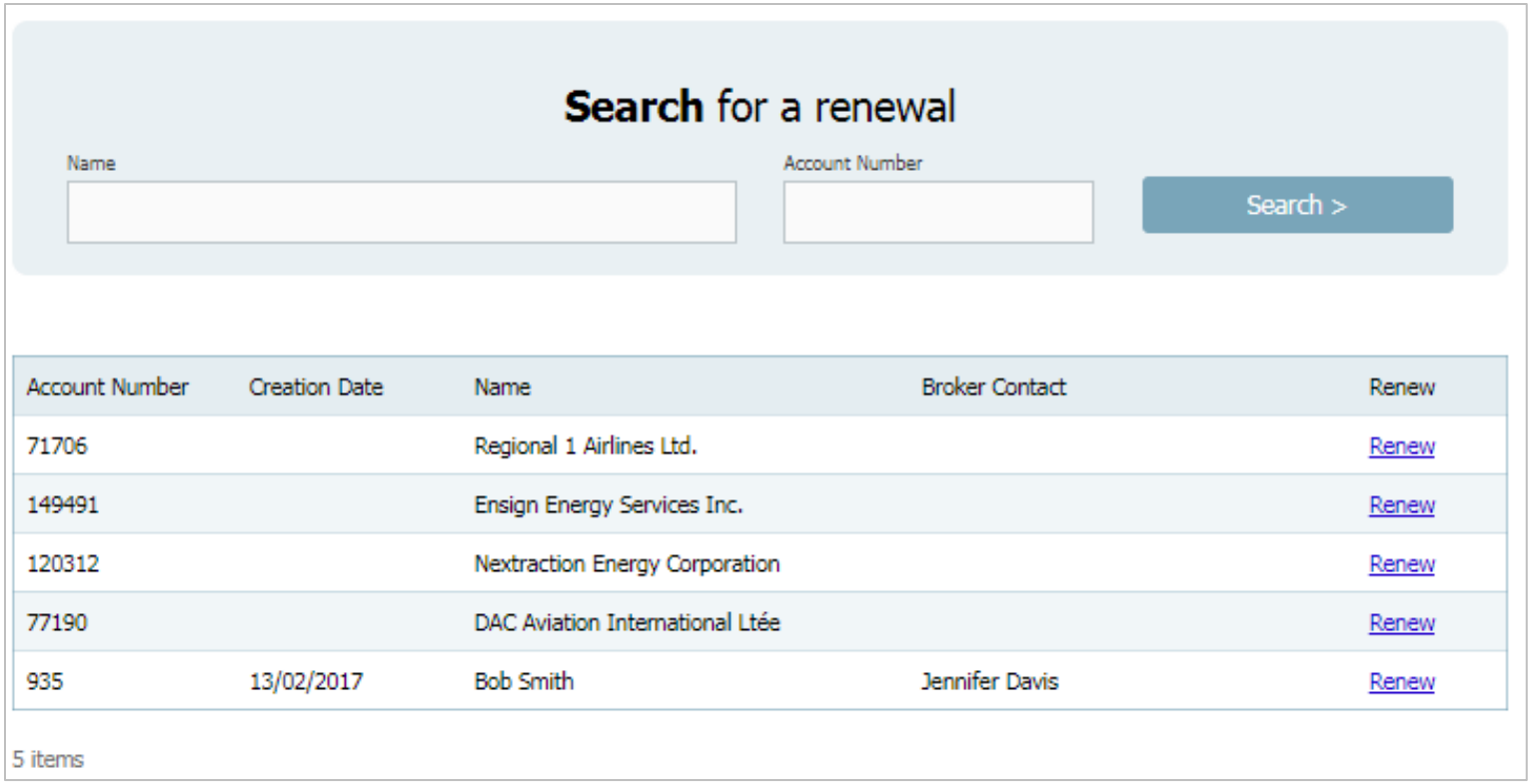


Renewals



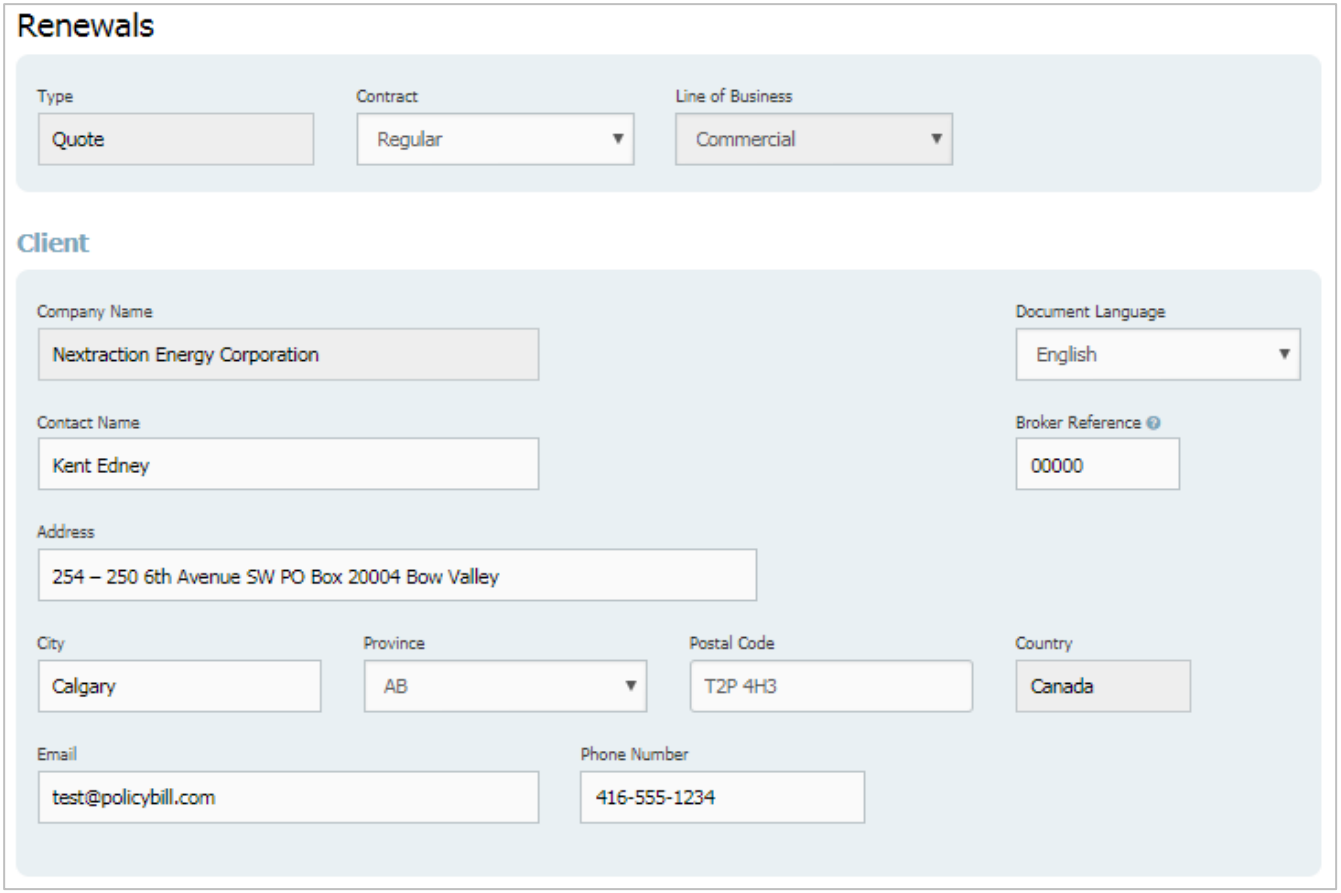
- Click on Renewals in the top menu bar
- Search for a renewal by entering your clients and/or account number

Renewals

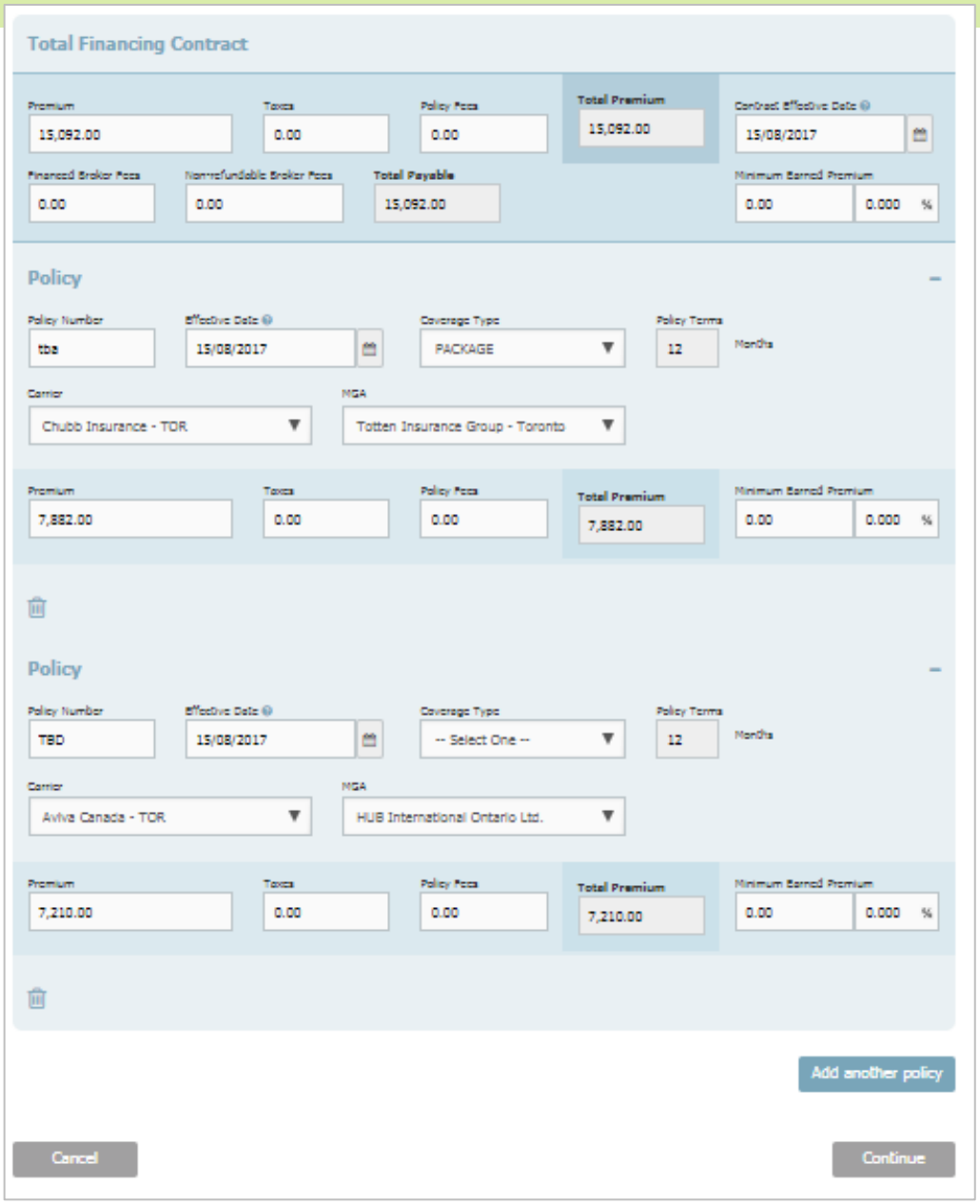


- List of relevant accounts up for renewal will appear. Locate the account you wish to action and click **Renew**

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

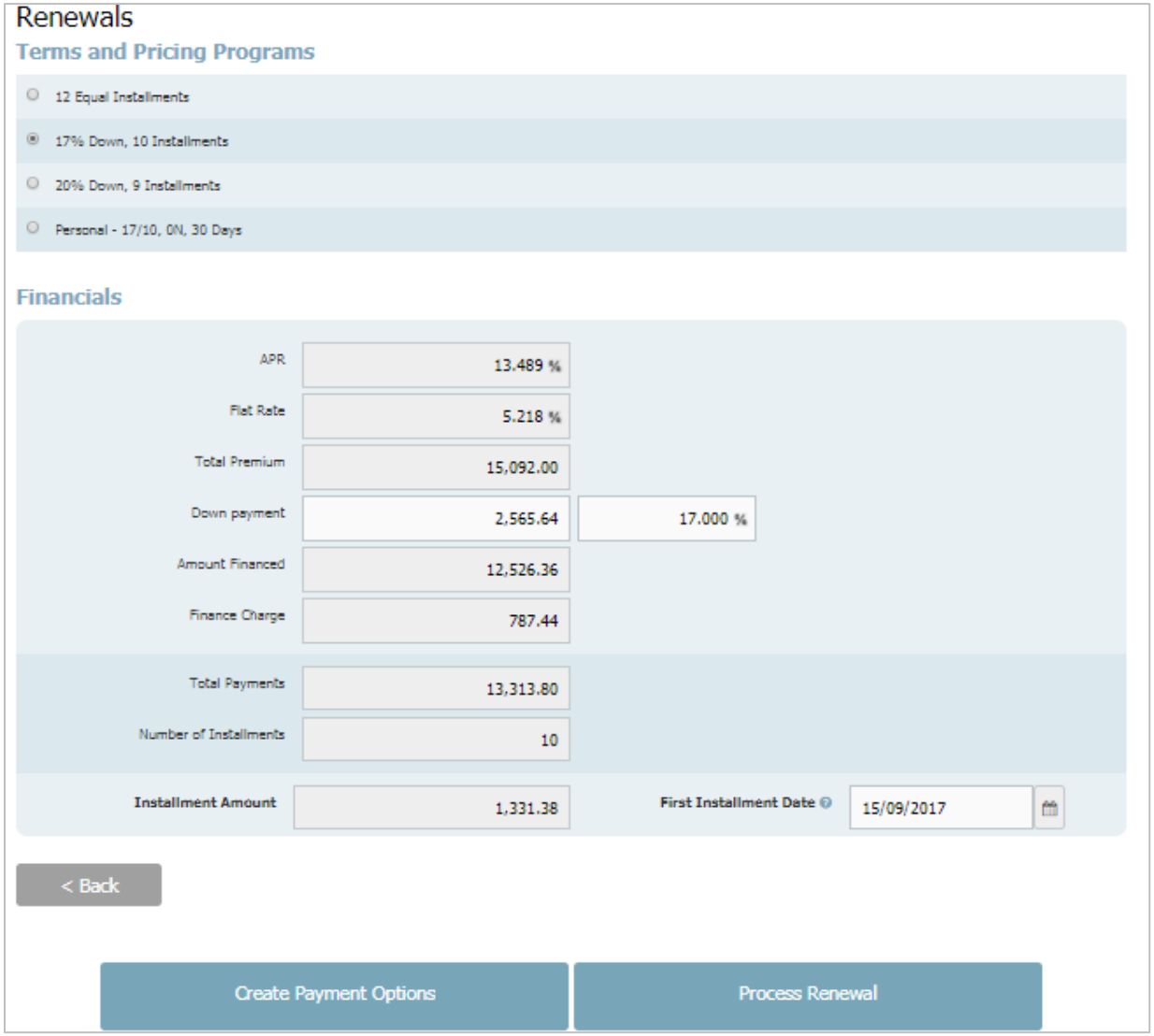


- Update the premium and policy details, if necessary
- Enter the effective date
- Add another policy, if necessary
- Click **Continue**



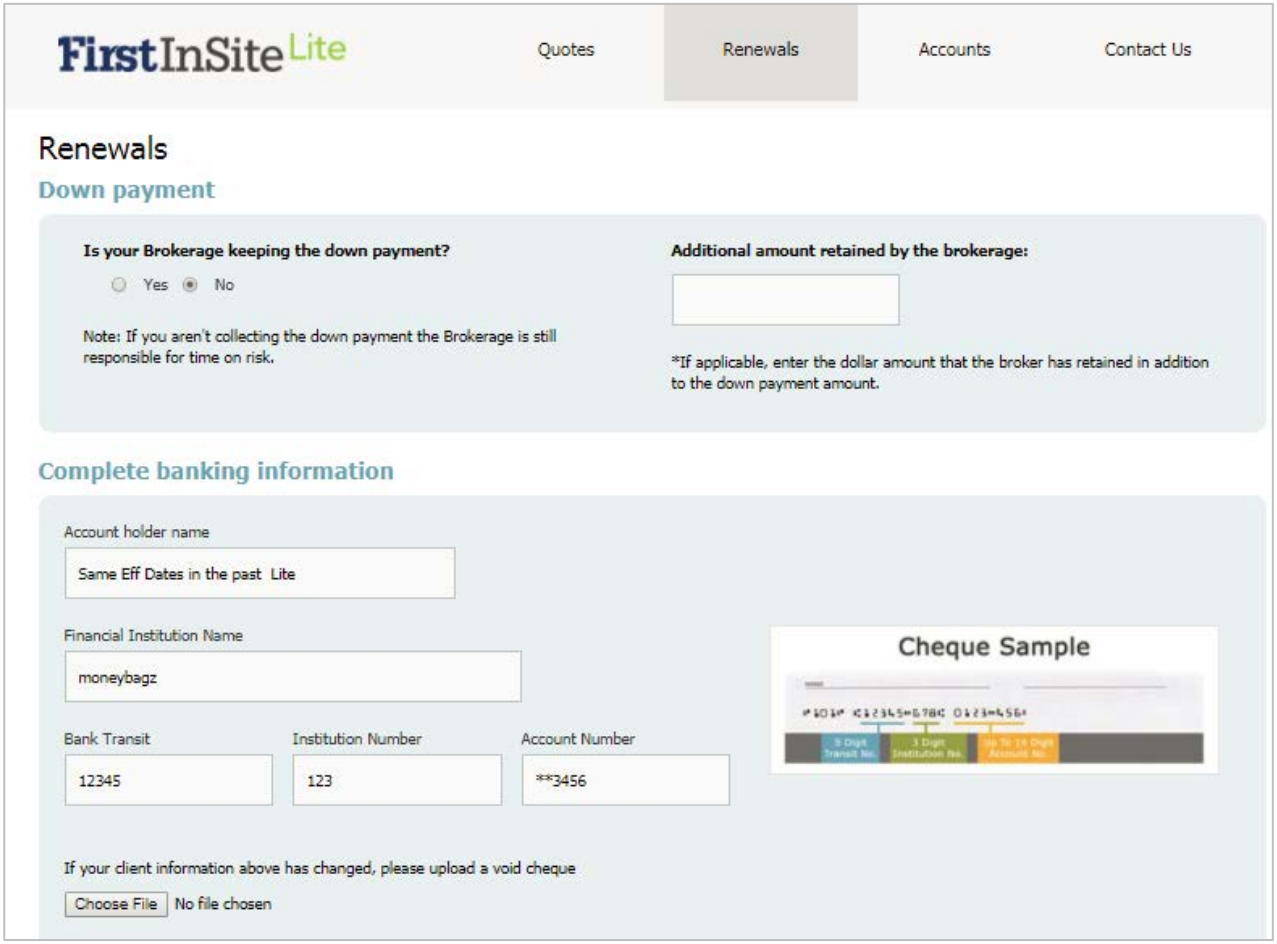
FIRST INSURANCE FUNDING OF CANADA
A WINTRUST COMPANY

- Select the **pricing program**
- Edit the **down payment**, if necessary
- Edit the **installment date,** if necessary
- Click **Create Payment Options** or **Process Renewal**



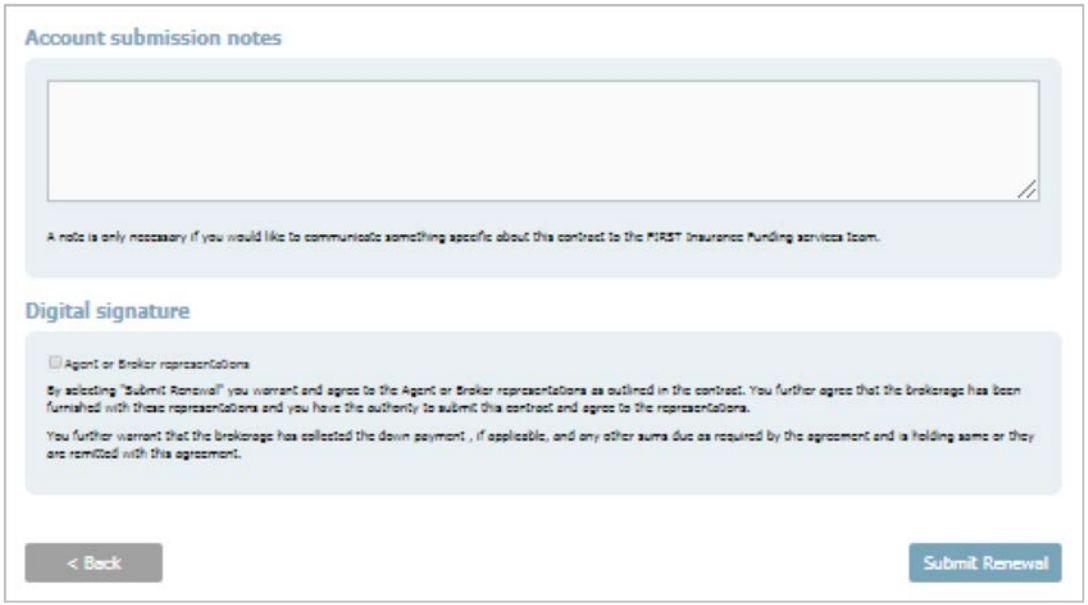
Processing Renewals

- We collect the down payment unless you select that you have already done so
- Update the banking information if it has changed since last year.

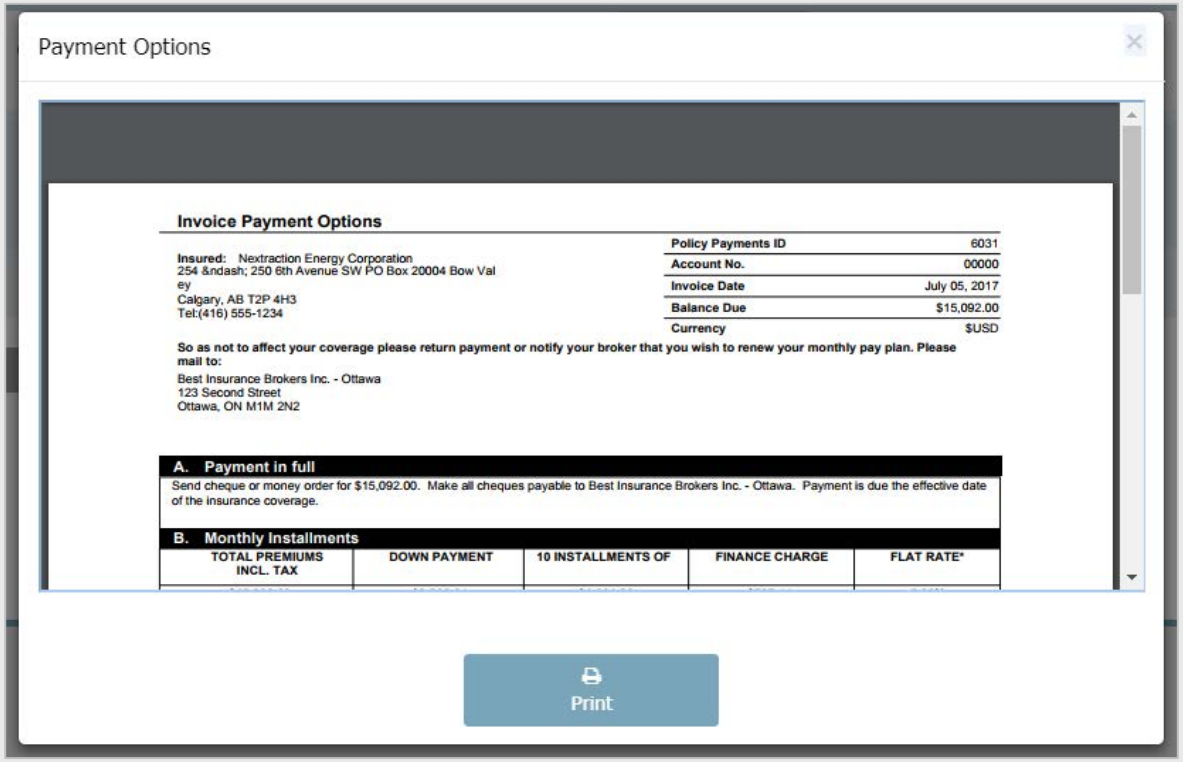


Processing Renewals

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



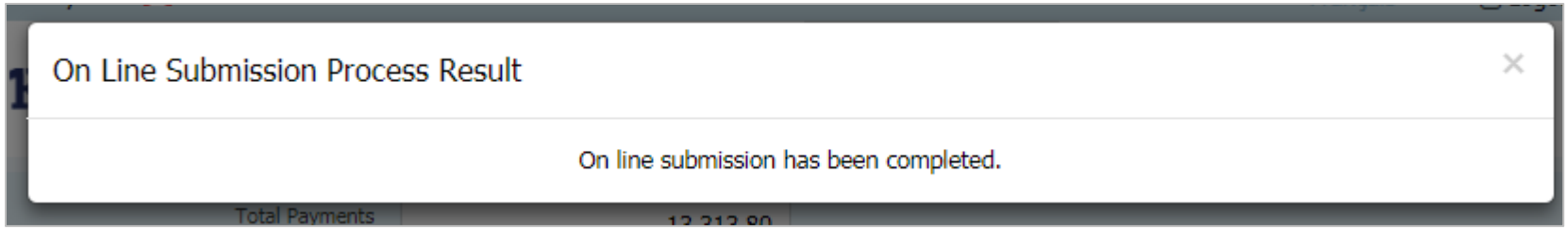
Processing Renewals



- 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