

FINANCEMENT D'ASSURANCE®
FIRST — DU CANADA —
UNE COMPAGNIE WINTRUST

First InSite *Enhanced*^{MC}

Renouvellements et primes
additionnelles

Ordre de la présentation

Sujets couverts dans ce guide:

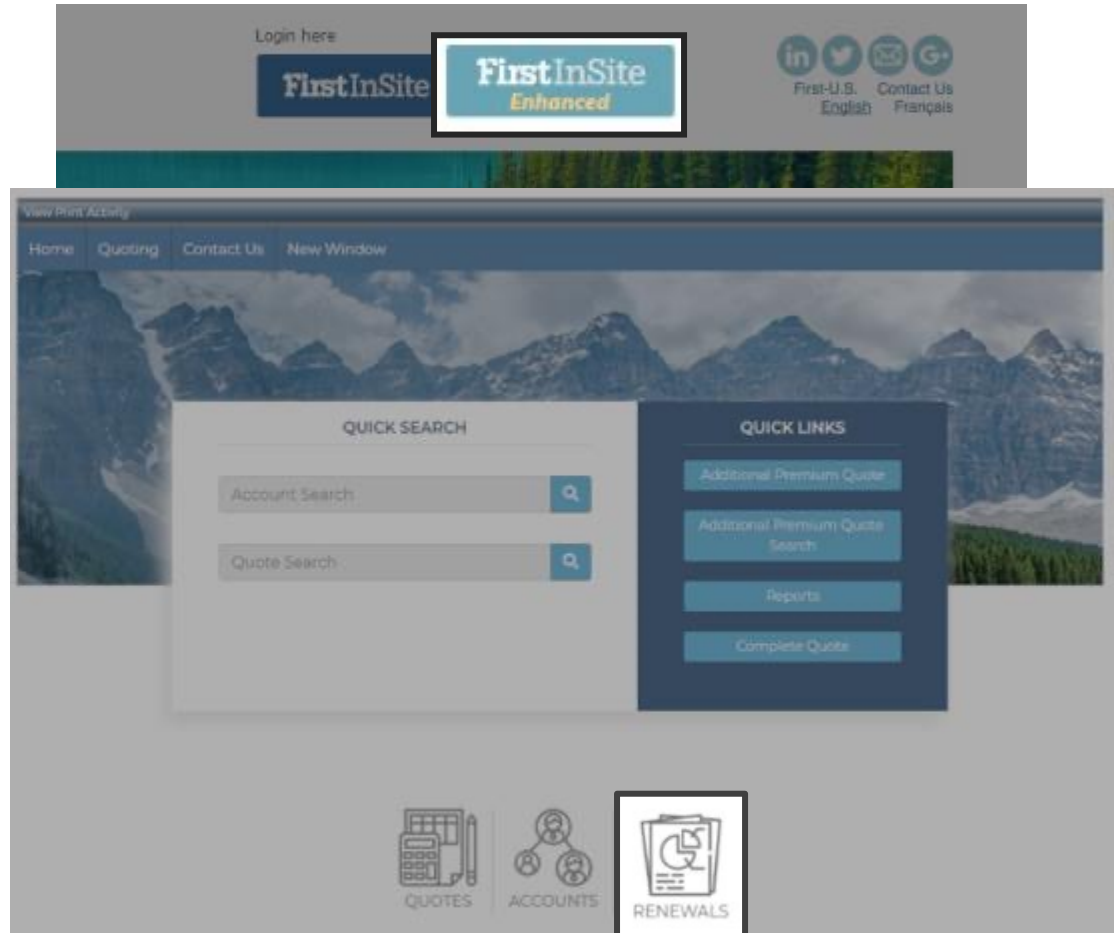
1. Renouvellements
2. Primes additionnelles
(endossements)
3. Trucs

Identification

- › Cliquez sur le bouton **First InSite Enhanced^{MC}**
firstinsurancefunding.ca

- › Identifiez vous à l'aide de votre nom d'utilisateur (adresse courriel) et le mot de passe

- › Sélectionnez **Renewals**



- › Entrez un compte ou un numéro et cliquez sur **Search** pour récupérer le prêt

Renewal Quote

Brokerage: [Select an Item] ▼

Account #: Name:

Account No +	Creation Date	Name	Brokerage	Action
--------------	---------------	------	-----------	--------


Renewal Quote

Brokerage: A00034 - Best Insurance Brokers Inc. - Ottawa ▼

Account #: Name:

Account No +	Creation Date	Name	Brokerage	Action
● 25288	05/02/2025	ABC Company	Best Insurance Bro...	Renew Link

- › Réviser les informations de l'assuré
- › Réviser les taux
- › Réviser l'information générale sur le prêt et cliquer sur **Next**

 **TRUC:** Vous pouvez choisir d'envoyer des notifications aux clients par courriel en cliquant sur la case à cocher

Quote Entry -

Customer Information Policies Terms

Quoting for: A00034 - Best Insurance Brokers Inc. - Ottawa Ottawa, Ontario

Name & Address	Contact
Name: ABC Company	Main Phone:
	Contact:
Address: 123 Main Street	E-Mail: client@abc.ca
	Main Fax:
City: Ottawa	Create: [New Contact Info]
Country: Canada	
Province / Postal: ON - Ontario A1A 1A1	

Additional Addresses

Email Notices to Customers:

Customer ID:

General Loan Information

Brokerage: A00034 - Best Insurance Brokers Inc. -	Alt Account #:
Pricing Program: 17% Down, 10 Installments	Line of Business: Commercial
Terms: 17/10, 30 Day Funding	Preferred Language: English
Standard/Continuous Pay: Standard	New/Renewal: New
Origination Code: Entity	
Broker Contact: sarah.smit Sarah Smith	
Broker Phone: (111) 111-1111	
Broker Email: marketing@firstinsurancefunding.ca	

Back Cancel Next >

› Au besoin, mettez le numéro de police et l'information sur le grossiste à jour

› Entrez la date d'entrée en vigueur

› Si requis, mettez le montant de la prime à jour, les frais et les taxes

› Sélectionnez **Save**

Quote Entry -

Customer Information **Policies** Terms

Policy #	Eff Date	Carrier	Coverage	Premium	Policy Fees	Taxes	Total
1	27/10/2025		GL	20,000.00	0.00	1,600.00	21,600.00 x

New Policy 21,600.00

Policy Number: AV2341 Coverage: GENERAL LIABILITY

Effective Date: 27/10/2025 Policy Term (Months):

Carrier: Aviva Canada

MCA: Return Method:

Premium: Min. Earned Premium:

Policy Fees:

Taxes:

Total Amount: 21,600.00

- › Réviser toutes les polices listées ci-haut
- › Cliquez sur **Next** pour continuer

Quote Entry -

Customer Information **Policies** Terms

Policy #	Eff Date	Carrier	Coverage	Premium	Policy Fees	Taxes	Total
1 AV2341	27/10/2025	Aviva Canada	GL	20,000.00	0.00	1,600.00	21,600.00 x

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:

› Vérifiez la date d'échéance du premier paiement et modifiez-la si nécessaire

› Entrez les frais de courtage applicables et cliquez sur **Recalculate**

› Révisez l'information financière et cliquez sur **Save**

The screenshot shows a software interface with three tabs: "Customer Information", "Policies", and "Terms". The "Terms" tab is active, displaying "Quote Variables".

Quote Variables

Governing Province:	Ontario	Non-Refundable Broker Fee:	0.00
First Payment Due Date:	27/11/2025	Financed Broker Fee:	0.00
Billing Cycle:	Monthly	Down Payment:	17.000 % 3,672.00
Billing Method:	Pre-authorized	No. of Installments:	10
Disbursement Delay:	30 Days	APR:	4.341 %
Rate Chart:	Best Insurance Rate	Broker Premium Fin. Referral Fee:	0.00
Broker Premium Fin. Referral Fee Plan:	ON	Application Fee:	

Buttons: "Reset to Defaults" and "Recalculate" (highlighted).

General

Governing Province:	Ontario
First Payment Due Date:	27/11/2025
Billing Cycle:	Monthly
Disbursement Delay:	30 Days
Rate Chart:	Best Insurance Rate Plan
Broker Premium Fin. Referral Fee Plan:	ON
Equal Pay Quote:	No
Earned Broker Fee:	0.00
Financed Broker Fee:	0.00

Financials

Broker Premium Fin. Referral Fee:	0.00
APR:	4.341 %
Flat Rate:	1.660 %
Total Premium:	21,600.00
Down Payment:	17.000 % 3,672.00
Amount Financed:	17,928.00
Finance Charge:	358.60
Total of Payments:	18,286.60
No. of Installments:	10
Installment Amount:	1,828.66

Buttons: "< Back", "Submit", "Save" (highlighted), "Cancel", "Next >".

- › Confirmez que l'information est exacte et cliquez sur **Submit** pour procéder à la soumission du renouvellement

 **TRUC:** Nos renouvellements de contrats sont éco-responsable- aucune signature requise

Quote - 151662 - ABC Company

Customer Information Policies **Terms** Summary Documents

Quote Variables

Governing Province:	Ontario	Non-Refundable Broker Fee:	0.00
First Payment Due Date:	27/11/2025	Financed Broker Fee:	0.00
Billing Cycle:	Monthly	Down Payment:	17.000 % 3,672.00
Billing Method:	Pre-authorized	No. of Installments:	10
Disbursement Delay:	30 Days	APR:	4.341 %
Rate Chart:	Best Insurance Rate	Broker Premium Fin. Referral Fee:	0.00
Broker Premium Fin. Referral Fee Plan:	ON	Application Fee:	

Reset to Defaults Recalculate

General		Financials	
Governing Province:	Ontario	Broker Premium Fin. Referral Fee:	0.00
First Payment Due Date:	27/11/2025	APR:	4.341 %
Billing Cycle:	Monthly	Flat Rate:	1.660 %
Disbursement Delay:	30 Days	Total Premium:	21,600.00
Rate Chart:	Best Insurance Rate Plan	Down Payment:	17.000 % 3,672.00
Broker Premium Fin. Referral Fee Plan:	ON	Amount Financed:	17,928.00
Equal Pay Quote:	No	Finance Charge:	358.60
Earned Broker Fee:	0.00	Total of Payments:	18,286.60
Financed Broker Fee:	0.00	No. of Installments:	10
		Installment Amount:	1,828.66

Submit Edit Close Payment Options

- › Si l'assuré souhaite revoir les conditions de renouvellement, un EFP peut être généré sur l'onglet Documents
- › Sélectionnez PFA du menu déroulant et cliquez sur **Now...**
- › Une fenêtre additionnelle s'ouvrira avec le PDF du document de renouvellement

Quote - 151662 - ABC Company

Customer Information Policies Terms Summary **Documents**

Title	Description	Method	Creator	Date Created	Pages
Premium Finance Agreement		Manual	Bob Nichols	01/12/2025	4
Premium Finance Agreement		Manual	Quote Import	01/12/2025	3
Premium Finance Agreement		Manual	Quote Import	01/12/2025	3
Premium Finance Agreement		Manual	Hilary Adams	01/12/2025	4

4 Items

Generate Notice: Premium Finance Agreement

On Line Account Submission Process

Customer Name:	English Personal Renewal	Total Account:	5,050.00
Interest Charge Total Due:	189.34	Amount of Deposit:	482.50
Term:	11	Amount of Installments:	432.44

Is your Brokerage keeping the down payment? Yes No

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

Confirmez le paiement initial et tout montant supplémentaire retenu

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:

Account Holder Name:

Institution Number:

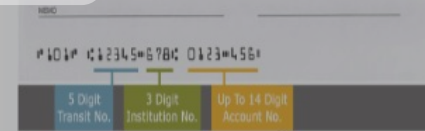
Financial Institution Name:

Bank Transit:

Account Number:

Révissez l'information bancaire de l'assuré

Cheque Sample



If your client's banking details have changed, upload a new void cheque.

[Edit Banking](#) [Choose file](#)

Account Submission Note:

(Facultatif) Si vous avez des instructions spéciales, entrez les dans la note de soumission du prêt

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

Pas besoin de signer, d'envoyer par courriel ou par fax; cliquez simplement pour accepter

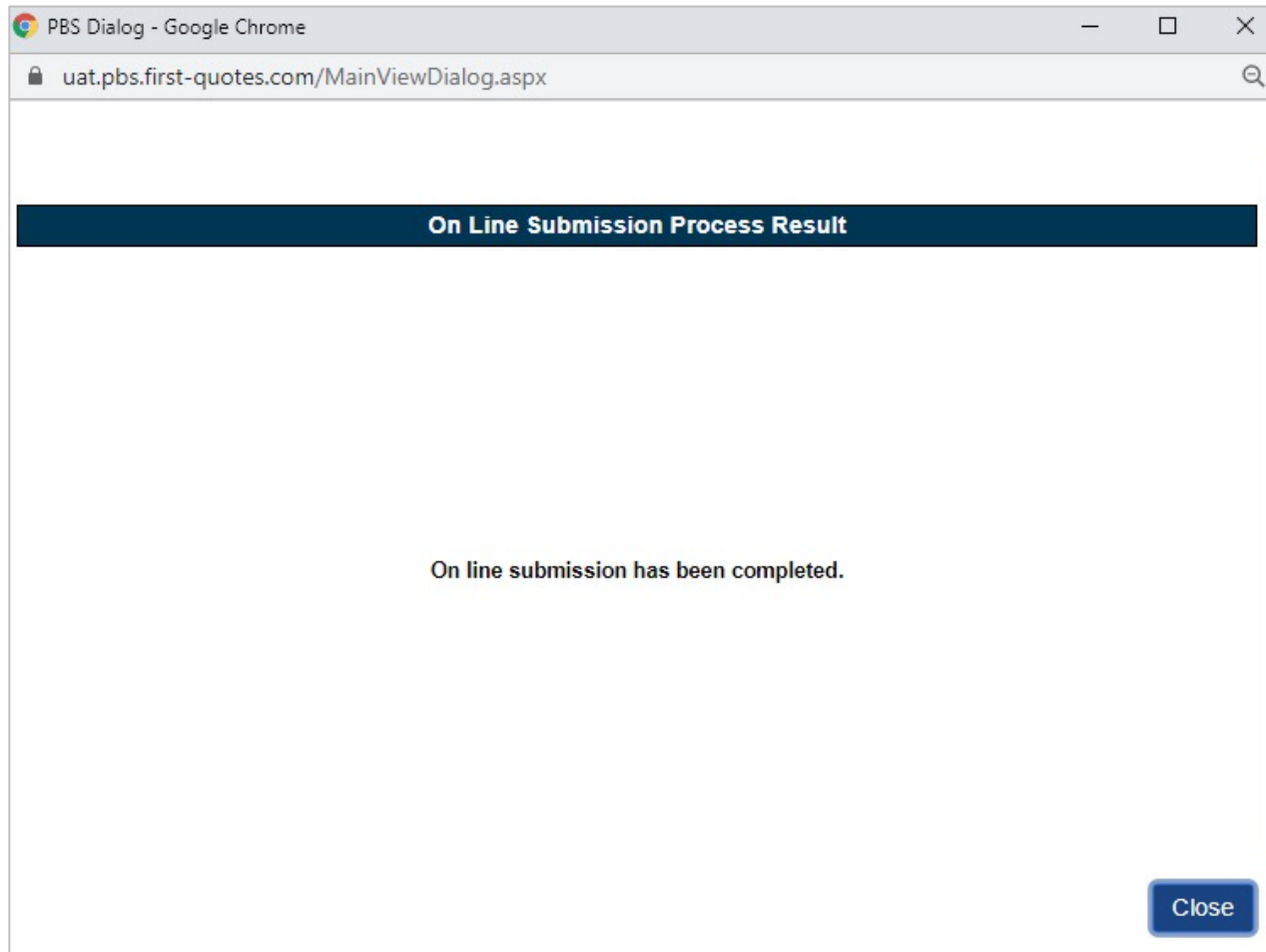
By selecting 'Submit for Processing' you warrant and agree to the Agent or Broker Representations as outlined in the contract. You further agree that the brokerage has been furnished with these representations and you have the authority to submit this contract and agree to the representations.

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.

[Complete On Line Submission](#) [Cancel Submission](#)

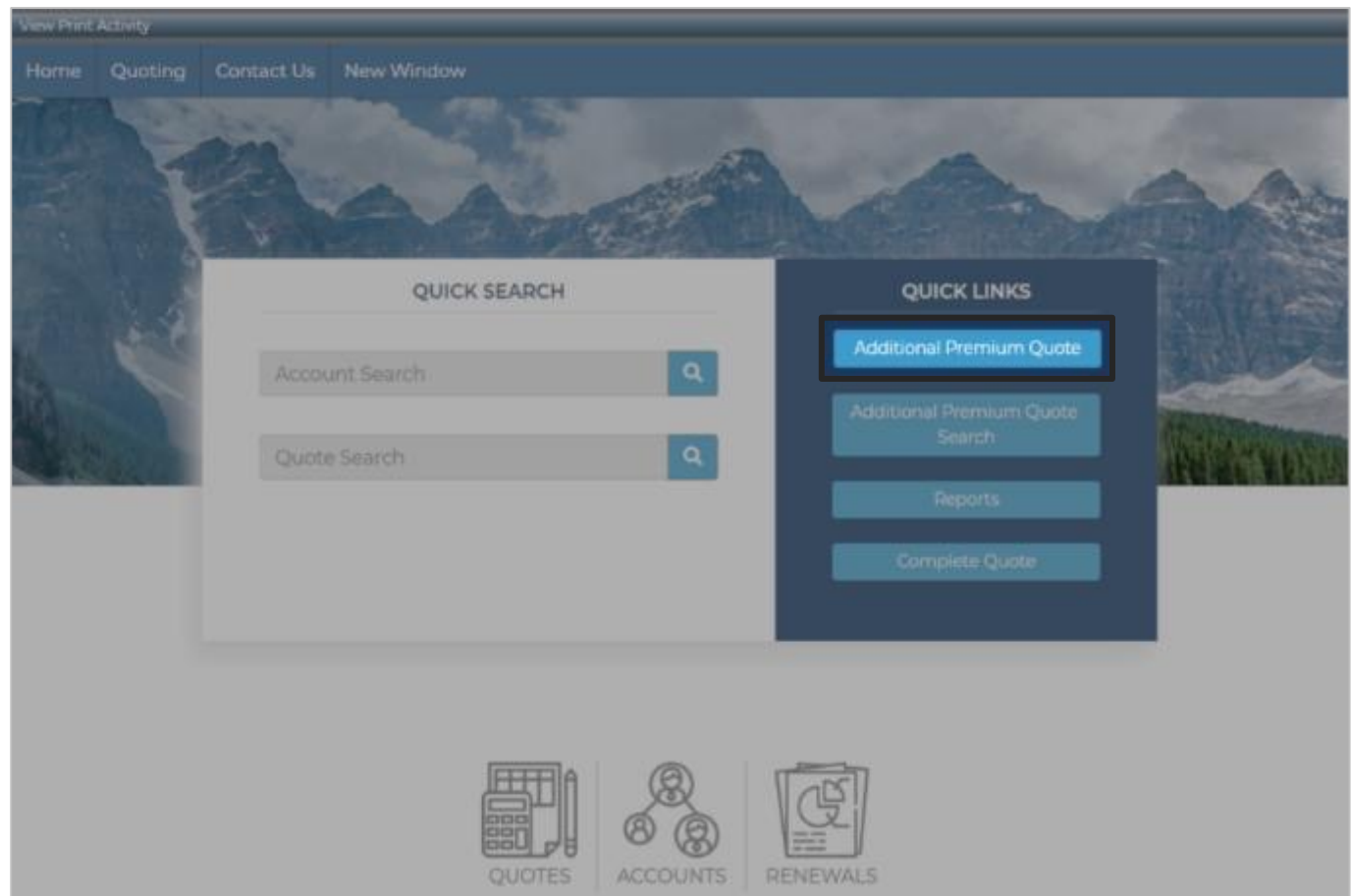
Cliquez sur **Complete On Line Submission**

Confirmation



Prime additionnelle

- › Sélectionnez **Additional Premium Quote** à partir de la page d'accueil



- › Entrez dans les critères de recherche et cliquez sur **Search**
- › Cliquez sur le compte que vous souhaitez approuver

Additional Premium Quote Entry - Search

Account #: Name: Serial #:
Address: City: Policy #:
Region: Postal Code: Pymt Amt Rcvd:
Customer ID: Quote #:
 Include Archived Accounts

[Advanced...](#) [Search](#)

Account No +	Name	Address	City	Region	APs
901-30544	BMS Renewal Test	20 Toronto St	Toronto	ON	0
901-28407	14814 Test SC	123 here st	Toronto	ON	0
901-28399	14814 Test SC	123 here st	Toronto	ON	0
901-28381	14814 Test SC	123 here st	Toronto	ON	0
901-27748	Krusty the Clown	123 Springfield	Springfield	ON	0
901-27474	BMS Link Renewal Test 2	123 Any Street	Toronto	ON	0
901-27466	BMS Renewal Test	123 Any Street	Toronto	ON	0
901-19638	XYZ	1 Main St.	Toronto	ON	1
901-13615	Studio 7 Ltd.	123 St	Hamilton	ON	1
901-13235	ABC Company	123 St	Hamilton	ON	0
901-10868	Holding it together	6 Mullholland Drive	St. John's	NL	1
901-9035	100000 Ontario Ltd.	120 Ayeza Street	Toronto	ON	0
901-5075	United Parcel Services	100 United Way	Toronto	ON	0

14 items

› Cliquez sur
Next

Additional Premium Quote Entry - 14814

Customer Information Policies Terms

Customer Information		Summary Financials	
Private Label:	Hilary's Test Label	Total Premium:	900.00
Account Number:	28407	Down Payment: (8.560 %)	77.04
Account Holder:	14814 Test SC	Amount Financed:	822.96
Main Address:	123 here st Toronto, ON M1M 1M1	Non-Refundable Fee:	0.00
Brokerage:	A00034 - Best Insurance Brokers Inc. - Ottawa	Finance Charge:	64.41
Broker Contact:	11	Total of Payments:	887.37
Broker Phone:	1111111111	No. of Installments:	11
Broker Email:	1@3.ca	Installment Amount:	80.67
Customer ID:	--	APR:	15.329 %
Origination Code:	Entity	Flat Rate:	7.157 %
Received Date:	--	Installments Made/Remaining:	3 / 8
Creation Date:	08/08/2025	Next Installment Amount:	80.67
Created By:	PBS System	Next Late Fee Amount:	4.03
Effective Date:	08/08/2025	Shortage:	0.00
Archive Date:	--	Auto Assessed Late Fee Breakdown	
Balance Due Date:	--	Account Balance (inc. fees):	645.36
Settlement Date:	--	Current Amount Due:	0.00
Next Intent Date:	12/12/2025		
Scheduled Cancellation Date:	28/12/2025		
Cancellation Hold:	--		
Manual Cancellation Date:	--		
Cancellation Print Date:	--		
Cancellation Effective Date:	--		
Next Reinstatement Date:	--		
Next Late Fee Date:	10/12/2025		
First Payment Due Date:	08/09/2025	Last Intent Date:	--
Next Payment Due Date:	08/12/2025	Last Cancellation Date:	--
Final Payment Due Date:	08/07/2026	Last Reinstatement Date:	--

< Back Cancel **Next >**

- › Cliquez sur **New Policy** ou **Add AP to existing policies**

Additional Premium Quote Entry - 14814

Customer Information **Policies** Terms

Policy #	Eff Date	Carrier	Coverage	Premium	Policy Fees	Taxes	Total
No policies defined.							0.00

New Policy **Add AP to existing policies**

Policy Details

Policy Number: Coverage:

Effective Date: Policy Term (Months):

Carrier:

MGA:

Premium: Return Method:

Policy Fees: Min. Earned Premium:

Taxes:

Total Amount:

Nouvelle police

- › Pour ajouter une police additionnelle, entrez les détails de la police de la même façon que vous le ferriez pour une soumission

Additional Premium Quote Entry - 14814

Customer Information **Policies** Terms

Policy #	Eff Date	Carrier	Coverage	Premium	Policy Fees	Taxes	Total
No policies defined.							
<input type="button" value="New Policy"/>	Add AP to existing policies						0.00

Policy Details

Policy Number: Coverage:

Effective Date: Policy Term (Months):

Carrier:

MGA:

Premium: Return Method:

Policy Fees: Min. Earned Premium:

Taxes:

Total Amount:

Ajouter AP à une police existante

- › Pour modifier une police, sélectionnez la police que vous désirez endosser

Account Details ×			
Policy List			
Loan:	Original Loan		
Policy Number:	tba	Coverage:	AUTO - AUTOMOBILE
Effective Date:	08/08/2025 (12 months)	Insurance Carrier:	C00016 - Carrier
Return Method:	90% Pro-Rata	MGA:	[unspecified]
Premium (Including Fees): 900.00			
1 Item			900.00

- › Réviser et mettre à jour la date d'entrée en vigueur, le montant de la prime, les frais et les taxes et cliquer sur **Save**
- › Cliquez sur **Next** pour procéder

Additional Premium Quote Entry - 14814

Customer Information Policies Terms

Policy #	Eff Date	Carrier	Coverage	Premium	Policy Fees	Taxes	Total
2 tba		Carrier	AUTO				0.00

New Policy Add AP to existing policies 0.00

Policy Details

Policy Number: tba Coverage: AUTO - AUTOMOBILE
Effective Date: 27/10/2025 Policy Term (Months): 12
Carrier: C00016 - Carrier
MGA:
Premium: 1,000.00 Return Method: 90% Pro-Rata
Policy Fees: 0.00 Min. Earned Premium: 0.000% 0.00
Taxes: 0.00
Total Amount: 1,000.00

View Authorities Cancel **Save**
< Back Cancel

Additional Premium Quote Entry - 14814

Customer Information Policies Terms

Policy #	Eff Date	Carrier	Coverage	Premium	Policy Fees	Taxes	Total
2 tba	27/10/2025	Carrier	AUTO	1,000.00	0.00	0.00	1,000.00

New Policy Add AP to existing policies 1,000.00

Policy Details

Policy Number: Coverage:
Effective Date: Policy Term (Months):
Carrier:
MGA:
Premium: Return Method:
Policy Fees: Min. Earned Premium:
Taxes:
Total Amount:

View Authorities
< Back **Next >**

- › Réviser les détails dans l'onglet Termes et cliquez sur **Next** pour procéder

Additional Premium Quote Entry - 152033 - 14814

Customer Information Policies **Terms** Summary Documents

Quote Variables

Billing Cycle: Monthly First Payment Due Date: 08/01/2026: Maximum of 7 Installments

Quoting Terms: 12E, 30 Day Funding No. of Installments: 7

Down Payment: 19.060 % 190.60

APR: 15.321 %

Reset to Defaults Recalculate

General		Financials	
Quoting Terms	12E, 30 Day Funding	APR:	15.321 %
Billing Cycle:	Monthly	Flat Rate:	5.713 %
Rate Chart:	N/A	Total Premium:	1,000.00
First Payment Due Date:	08/01/2026	Down Payment:	19.060 % 190.60
		Amount Financed:	809.40
		Finance Charge:	57.13
		Total of Payments:	866.53
		No. of Installments:	7
		Installment Amount:	123.79
		Total Installment Amount:	204.46
		Discount Amount:	0.00

Close **Next** Print

Soumettre l'endossement

- › Voir le sommaire et cliquez sur **Submit** pour le traitement de l'endossement
- › Vous pouvez imprimer le sommaire
- › Un Avis d'acceptation vous sera envoyé à vous et à votre client quand l'endossement sera en traitement

The screenshot displays a web application interface for 'Best Insurance' with a confirmation dialog box overlaid. The dialog box contains the following text:

uat.pbs.first-quotes.com says

I hereby authorize FIRST Insurance Funding of Canada - UAT 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 all 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 - UAT under special and restricted conditions of limited interest.

Buttons: OK, Cancel

The background page shows a 'Premium Finance Quotation Summary' with the following details:

Quote Number: 152033 - 14814 Test SC
Date: 16/01/2020
Customer ID:

Loan Schedule:

Total Premium:	1,000.00
Down(9.060 %):	190.60
Amount Financed:	809.40
Finance Charge:	57.13
Total Payments:	866.53
Installments:	7
Installment Amount:	123.79
APR:	15.321 %
Flat Rate:	5.713 %
Total Installment Amount:	204.46

Additional Info:

- Your billing method is pre-authorized chequing.
- Your first installment is due on 08/01/2026.
- Your payments are due Monthly.

- › La confirmation apparait au haut de l'écran

Additional Premium Quote Entry - 151704 - 14814

Customer Information Policies Terms **Summary** Documents

Premium Finance Quotation Summary

This quote was submitted to FIRST Insurance Funding of Canada - UAT

Quote Number
151704 - 14814

Date
15/01/2020

Customer ID

Borrower

14814
123 here st
Toronto, ON M1M 1M1

Brokerage

Best Insurance Brokers Inc. - Ottawa
4490 Second Street
Ottawa, ON K6H 3B7

Trucs

1. Votre identifiant est maintenant votre adresse courriel
2. Notez qu'il doit y avoir plus d'un versement en suspens sur le contrat afin de traiter une prime supplémentaire
3. Pour apporter des modifications à une soumission AP existante avant de la soumettre, copiez la soumission existante et modifiez
4. Les guides de formation, vidéos, FAQs et webinaires sont disponibles sur notre site internet– Visitez l'onglet First InSite Enhanced^{MC}

Contactez nous

Communiquez avec un membre dévoué de notre équipe service et soutien pour toutes questions, ou vous pouvez nous rejoindre au:

serviceauxclients@firstinsurancefunding.ca

1 888 232 2238