



FIRST INSURANCE®
— OF CANADA — FUNDING
A WINTRUST COMPANY

FirstInSite *Enhanced*™

Submit a Quote

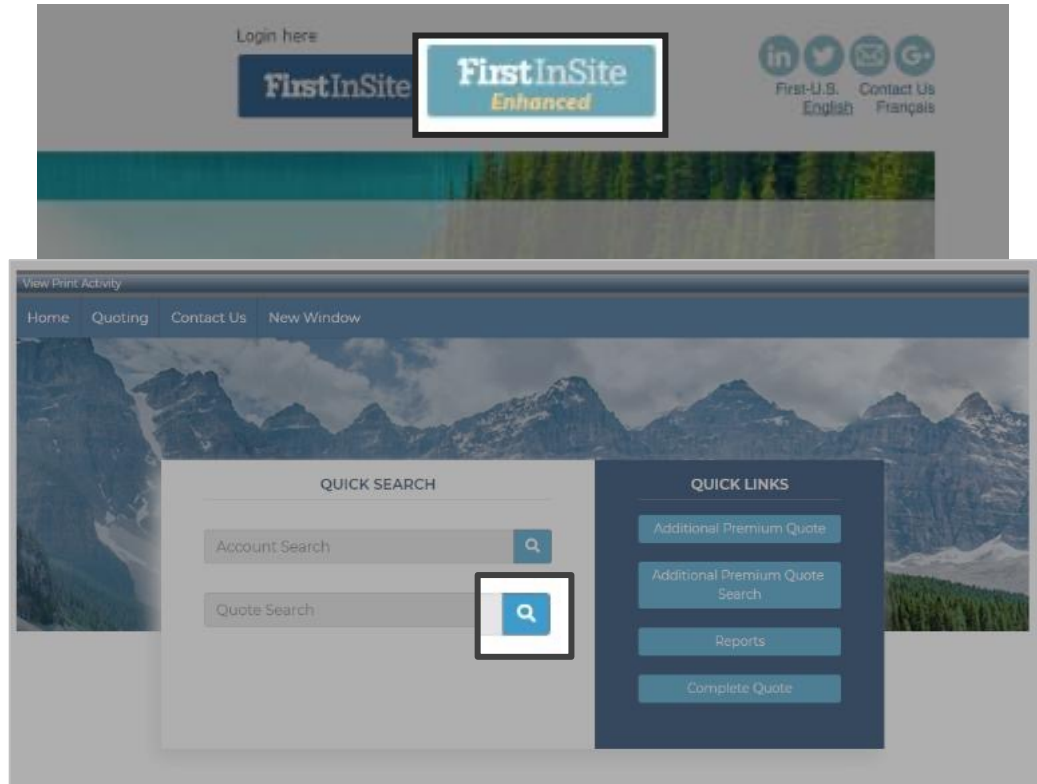
Agenda

Topics covered in this guide:


1. Submit a Quote
2. Tips

Login

- › Click on the **First InSite Enhanced™ login button**
firstinsurancefunding.ca
- › Login with your user name (email address) and password
- › Select **Quote Search**



- › Select quote you are looking to submit

 **TIP:** Quotes that begin with a P still need policy details entered.

Quote - Search

Quote #: Name:












Address: City:

Region: Postal Code:

Customer ID:

Specific Quotes:

Quoting For:

	Quote NO +	Name	Quoted Date	Total Premium	Down Payment	# Pay
	151662	ABC Company	15/01/2020	21,600.00	3,672.00	10
	151654	ABC Company	15/01/2020	21,600.00	3,672.00	10
	P151639	ABC Company	15/01/2020	21,600.00	3,672.00	10
	149815	Michele - Test	13/01/2020	100,000.00	8,560.00	11
	149286	Many Policy Lines	03/01/2020	128,160.00	12,816.00	10
	149245	ABC Company	15/01/2020	21,600.00	2,160.00	10
	149013	ABC Company	03/01/2020	21,650.00	1,836.00	11
	147215	BMS Renewal Te...	12/12/2019	5,000.00	428.00	11
	P146316	Walrus World	05/12/2019	1,000.00	85.60	11
	P146068	Walrus World	04/12/2019	3,250.00	594.00	10
	P136655	Wacky Walrus W...	31/10/2019	3,100.00	265.36	11


264 Items (3 Pages)

Select a quote to view or edit. Click New to create a new quote.

› Complete Policy details by selecting **Edit**

› If Policy details are already complete, advance to Terms tab

› Confirm insured's details

 **TIP:** You can opt to send notifications to clients by email by clicking the check box

Quote - 151639 - ABC Company

[Customer Information](#) [Policies](#) [Terms](#) [Summary](#) [Documents](#)

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

Name & Address		Contact	
Name:	ABC Company	Main Phone:	
		Contact:	
		E-Mail:	
Address:	123 Main Street	Main Fax:	
		Create:	
City:	Ottawa		
Country:	Canada		
Province / Postal:	ON - Ontario	AIA IAI	

[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.smith@bestinsurance.ca - Sarah Smit...		
Broker Phone:	(111) 111-1111		
Broker Email:	marketing@firstinsurancefunding.ca		

[Edit](#) [Close](#)

› Enter policy number and coverage type

› Enter carrier and/or MGA information

› Enter correct premium amount, fees and taxes and click **Save**

Quote - 151654 - ABC Company

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 ✕

New Policy 21,600.00

Policy Details

Policy Number: AV2341 Coverage: GL GENERAL LIABILITY

Effective Date: 27/10/2025 Policy Term (Months): 12

Carrier: C00002 Aviva Canada

MGA

Premium: 20,000.00 Return Method: Short-Rate


Policy Fees: 0.00 Min. Earned Premium: 0.000 % 0.00

Taxes: 1,600.00

Total Amount: 21,600.00

View Authorities Cancel Save

< Back Cancel Next >

 **TIP:** You can add multiple policies to one contract

- › If everything is correct click **Save**

Quote - 151654 - ABC Company

Customer Information Policies **Terms**

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:	

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

› Click **Submit**

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:	0N	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	Fiat 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:	0N	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

PBS Dialog - Google Chrome
uat.pbs.first-quotes.com/MainViewDialog.aspx

On Line Account Submission Process

Customer Name:	ABC Company	Total Account:	21,600.00
Interest Charge Total Due:	358.60	Amount of Deposit:	3,672.00
Term:	10	Amount of Installments:	1,828.66

Ensure you have a signed contract and customer banking information before submitting.

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.

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:	<input type="text"/>
Institution Number:	<input type="text"/>
Financial Institution Name:	<input type="text"/>
Bank Transit:	<input type="text"/>
Account Number:	<input type="text"/>

Upload image of signed Payment Options Form

Account Submission Note:

(Optional) If you have any special instructions, enter a Loan Submission Note

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

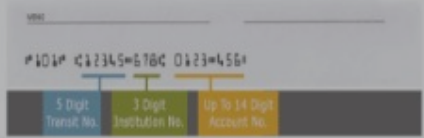
AGENT OR BROKER REPRESENTATIONS

No need to sign, email, fax; simply click to agree

By selecting 'Complete On Line Submission' 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.

Cheque Sample



Confirm down payment and any additional retained amounts

Enter insured's banking info

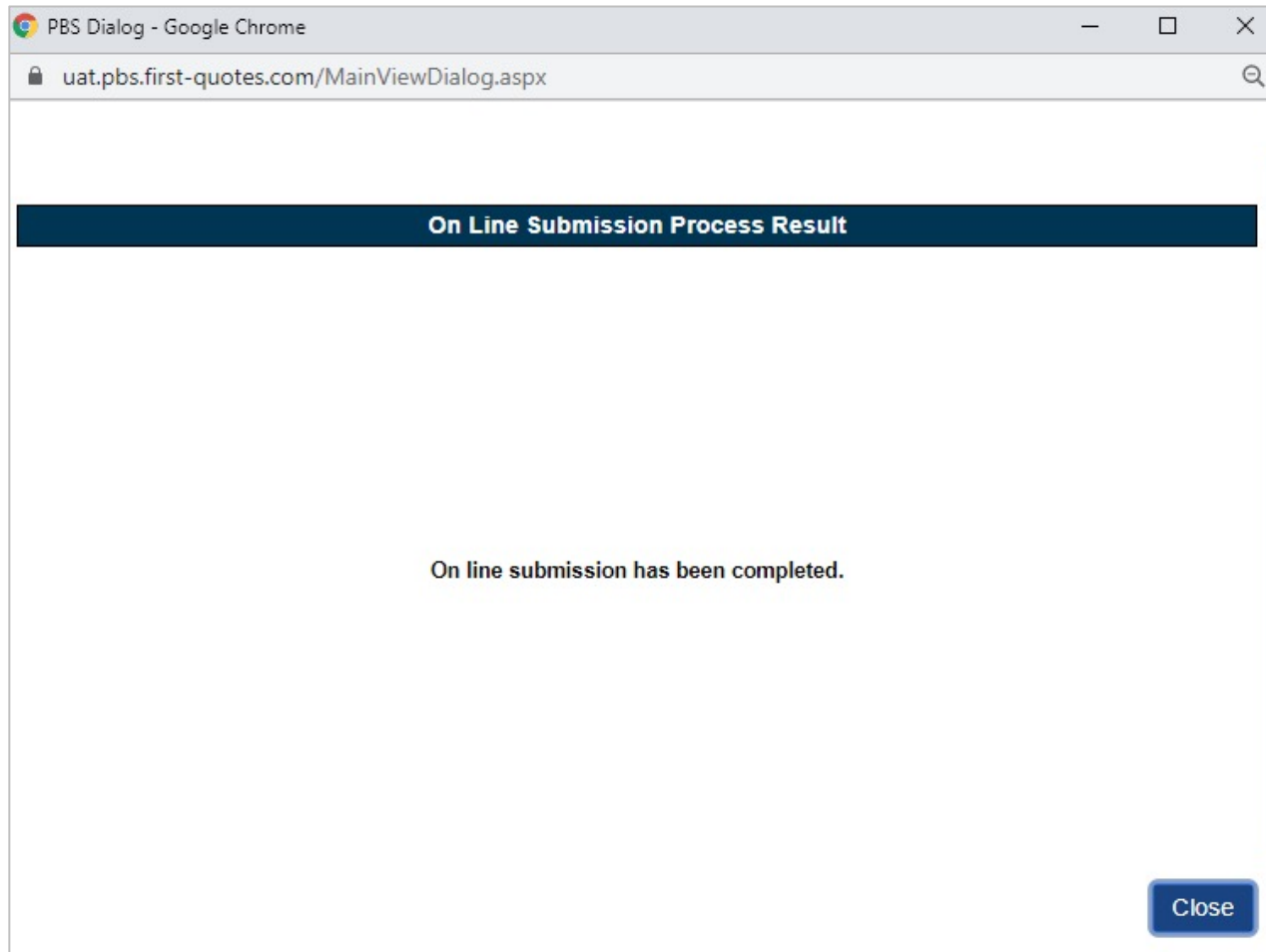
Upload signed Premium Finance Agreement and VOID cheque

(Optional) If you have any special instructions, enter a Loan Submission Note

No need to sign, email, fax; simply click to agree

Click **Complete** On Line Submission

- › Receive confirmation that your contract has been submitted for processing



Tips

1. Your login is now your email address
2. Login credentials and a temporary password will be emailed to you within 5 business days from training
3. 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
4. Training guides, videos, and FAQs available on our website – Visit First InSite Enhanced™ 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