



FIRST INSURANCE®  
— OF CANADA — FUNDING  
A WINTRUST COMPANY

# FirstInSite Lite™

Quotes



# Topics covered in this guide

- › Create a Quote
- › eSignature with DocuSign
- › Search for a Quote
- › Tips

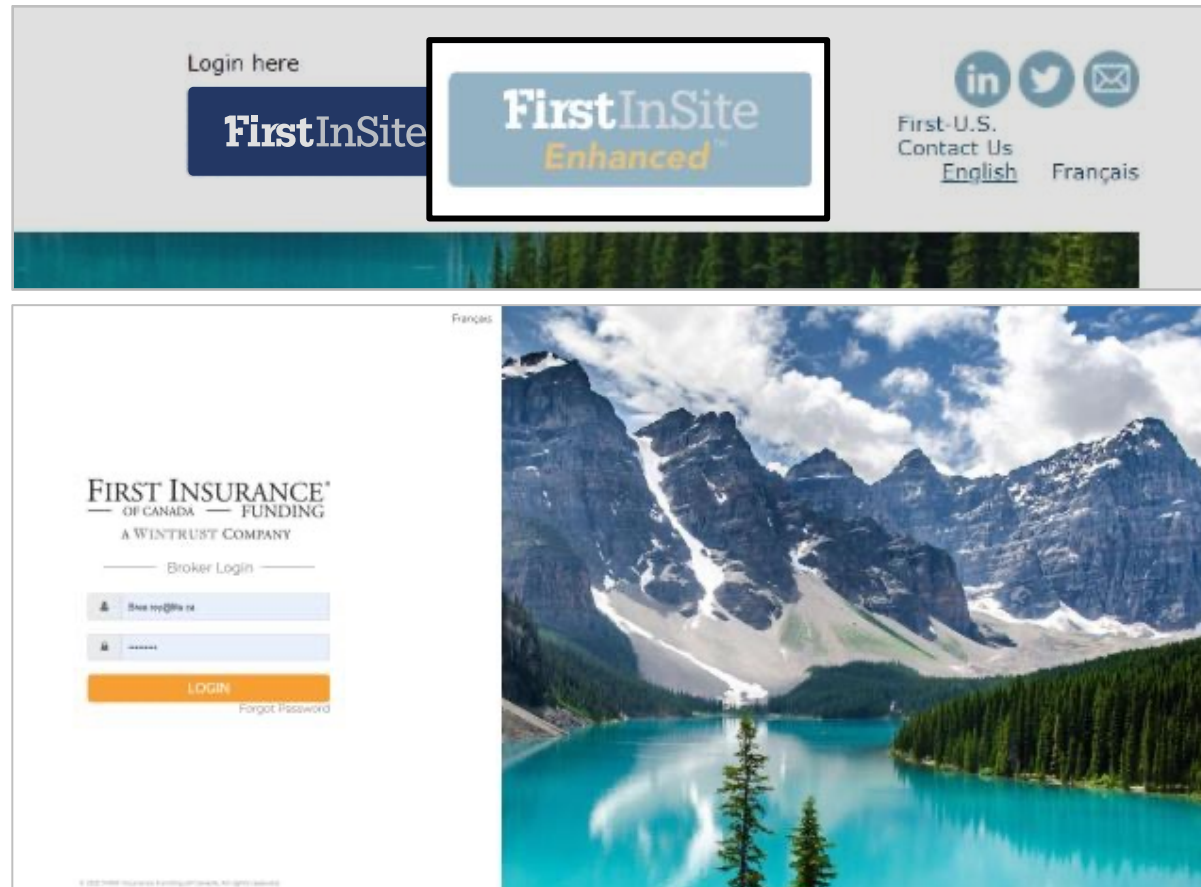




# First InSite Lite™

# Log in to First InSite Lite™

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







# New Business Quotes



# Create a Quote

- › Click **Quotes** in the Menu

The screenshot displays the FirstInSite Lite website interface. 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 menu includes 'Quotes', 'Renewals', 'Accounts', 'Additional Premium', and 'Contact us'. The background features a scenic landscape with mountains and a lake. Two prominent panels are overlaid on the page: 'Quick Search' and 'Quick Links'. The 'Quick Search' panel contains two search boxes: 'Quote Search' and 'Account Search', each with a search icon. The 'Quick Links' panel contains two buttons: 'New Quote' with a plus sign icon and 'Renewal' with a refresh icon. Both panels use icons representing a person and a dollar sign to denote user and financial actions.

# Create a Quote

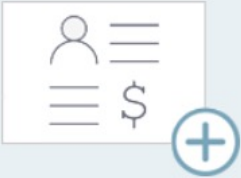
- › Click **Start** in the Create a new quote section

Currency: CAD  Français  Logout

**FirstInSite**Lite

Quotes Renewals Accounts Additional Premium Contact Us

### Create a new quote



[Start >](#)

### Search for a Quote



Name

Quote Number  Customer ID

[Search >](#)

# Create a Quote

- › Contracts can be Continuous Pay or Standard
- › Choose Commercial or Personal (if available)
- › Enter your client's details
- › Reference your BMS ID for that client in the Broker Reference field if you wish

Currency: CAD  Français  Logout

**FirstInSite** Lite Quotes Renewals Accounts Additional Premium Contact Us

### Quotes

Type:  Contract:  Line of Business:


### Client

Company Name:  Document Language:

Contact Name:

Address:

City:  Province:  Postal Code:  Country:

Broker Reference :

Email:  Phone Number:



# Create a Quote

- › Enter premium and policy information
- › To add multiple policies, click **Add another policy**
- › When complete, click **Continue**

### Total Financing Contract

Premium	Taxes	Policy Fees	<b>Total Premium</b>	Contract Effective Date
25,000.00	0.00	0.00	25,000.00	13/12/2017
Financed Broker Fees	Non-refundable Broker Fees	Total Payable	Minimum Earned Premium	
0.00	0.00	25,000.00	2,500.00	10.000 %

### Policy

Policy Number	Effective Date	Coverage Type	Policy Terms	
	13/12/2017	LIABILITY	12 Months	
Carrier	MGA			
Chubb Insurance - TOR	Totten Insurance Group - Toronto			
Premium	Taxes	Policy Fees	<b>Total Premium</b>	Minimum Earned Premium
25,000.00	0.00	0.00	25,000.00	2,500.00 10.000 %

[Add another policy](#)

[Cancel](#) [Continue](#)

# Create a Quote

- › Select the desired Pricing Program
- › The Financials will automatically populate
- › Edit the Down Payment, if desired
- › Edit the First Installment Date, if desired
- › Click **Create Payment Options**

## Quotes

### Terms and Pricing Programs

12 Equal Installments

17% Down, 10 Installments

20% Down, 9 Installments

Personal - 17/10, DN, 30 Days


### Financials

APR	<input type="text" value="10.990 %"/>
Flat Rate	<input type="text" value="4.238 %"/>
Total Premium	<input type="text" value="25,000.00"/>
Down payment	<input type="text" value="4,250.00"/> <input type="text" value="17.000 %"/>
Amount Financed	<input type="text" value="20,750.00"/>
Finance Charge	<input type="text" value="1,059.50"/>
Application Fee	<input type="text" value="35.00"/>
Total Payments	<input type="text" value="21,809.50"/>
Number of Installments	<input type="text" value="10"/>
Installment Amount	<input type="text" value="2,180.95"/>
First Installment Date	<input type="text" value="15/09/2017"/> <input type="button" value="📅"/>

# Policy Payment Options

- › The Payment Options Form is created and ready to send to your client.

Payment Options

  
**Best Insurance Inc.**

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

Insured/Borrower:  
ABC Company

**Pay Now**

Click the Pay Now button or view online at  
[policypayments.com/Best](http://policypayments.com/Best) using your  
Policy Payments ID:  
**157230**

**Payment Options Form**

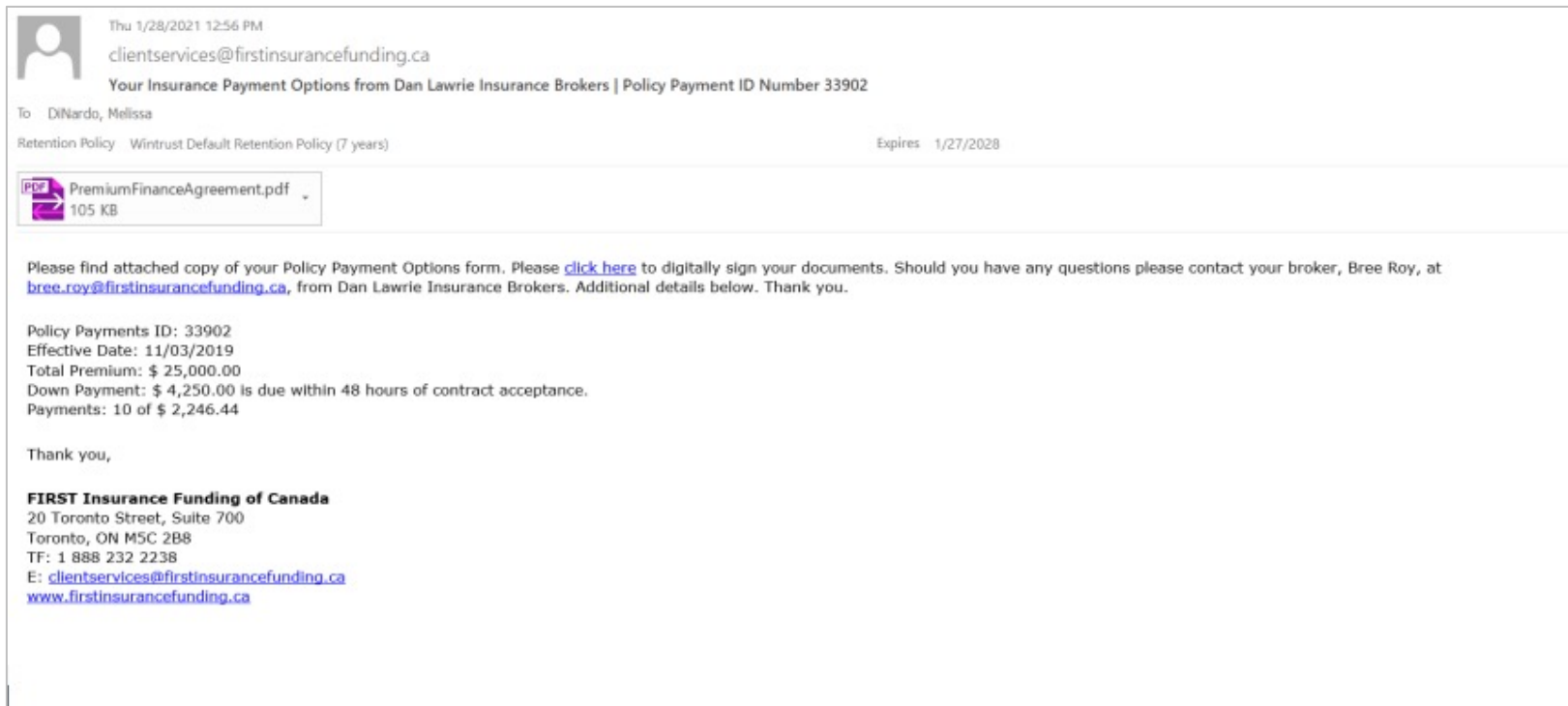
Monthly Payment Plans	Cost
-----------------------	------

Client Email Address:



# Policy Payment Options

- › You and/or your client receives an email with their payment options



# Paperless Payment Options

- › The insured begins the process by clicking on the **link in the email** and selecting desired payment option

The screenshot displays the 'Payment Options' page for Best Insurance Inc. The page header includes the company logo, name, and address: Best Insurance Inc., 4490 Second Street, Ottawa, ON, K6H 3B7. The insured/borrower is identified as 'ABC Company' with a total premium of \$21,600.00. The page is divided into two main sections: 'Monthly Payment Plans' and 'Full Payment Options'. Each option includes an icon, a title, a description of the payment method, and the associated fee.

Payment Option	Description	Fee
<b>Monthly Bank Withdrawal</b>	Pay for your premium with convenient monthly instalments from your bank account. Click the Monthly Bank Withdrawal button to digitally sign your Premium Finance Agreement.	3.00% Flat Rate
<b>Monthly Credit Card</b>	Pay for your premium with convenient monthly instalments via your credit card. Click the Monthly Credit Card button to digitally sign your Premium Finance Agreement and register your credit card.	3.00% Flat Rate + 2.97% System Access Fee
<b>Credit Card</b>	Pay for your full premium with your credit card. Click on the Credit Card button to proceed to the secure payment page.	2.97% System Access Fee
<b>Interac®</b>	Pay for your full premium up to \$10,000 via Interac®. Click the Interac® button and complete your email address. A payment link will be emailed to you.	No charge
<b>Cheque or Money Order</b>	Pay for your full premium via cheque. Click on the Cheque or Money Order button for mailing instructions.	No charge
<b>Single Bank Withdrawal</b>	Pay for your full premium from your bank account. Click on the Single Bank Withdrawal button to proceed to the secure payment page.	\$3.00

Please note, confirmation of payment does not bind coverage. You must receive coverage confirmation from your insurance broker.

Easy monthly payment plans provided by  
**FIRST INSURANCE**  
OF CANADA — FUNDING  
A WINTRUST COMPANY

Home | Terms and Conditions | Refund Policy | Security | Privacy Policy | Contact | [PolicyPayments](#)

# Monthly Payments

- › Upon selecting **Monthly Bank Withdrawal**, the insured will be directed to DocuSign to initiate the eSignature

## Please review and sign the Premium Finance Agreement

**FIRST Canada.**  
FIRST Insurance Funding of Canada..

Thank you for choosing FIRST Insurance Funding of Canada.

[View More](#)

**FIRST INSURANCE**  
OF CANADA — FUNDING  
A WINTRUST COMPANY

Powered by **DocuSign**

Please read the [Electronic Record and Signature Disclosure](#).

I agree to use electronic records and signatures.

**CONTINUE**    **OTHER ACTIONS** ▾

4490 Second Street  
Ottawa, ON K6H 3B7

Please complete the form below and return to you broker.

Transactions related to this payment plan will appear on your bank statement as FIRST Ins. Fund. Please be advised that any outstanding down payment, application fee, and/or past due installments at the time of contract acceptance will be debited within 2 business days.

Please provide your email and cell phone number. This information is only used to communicate with you

Insured Email:

Insured Phone Number:

Flat Rate	4.34%
Number of Installments	10
First Payment Due Date	27-Nov-2025
Currency	CDN
Line of Business	Commercial
Installment Amount <b>\$1,828.66</b>	



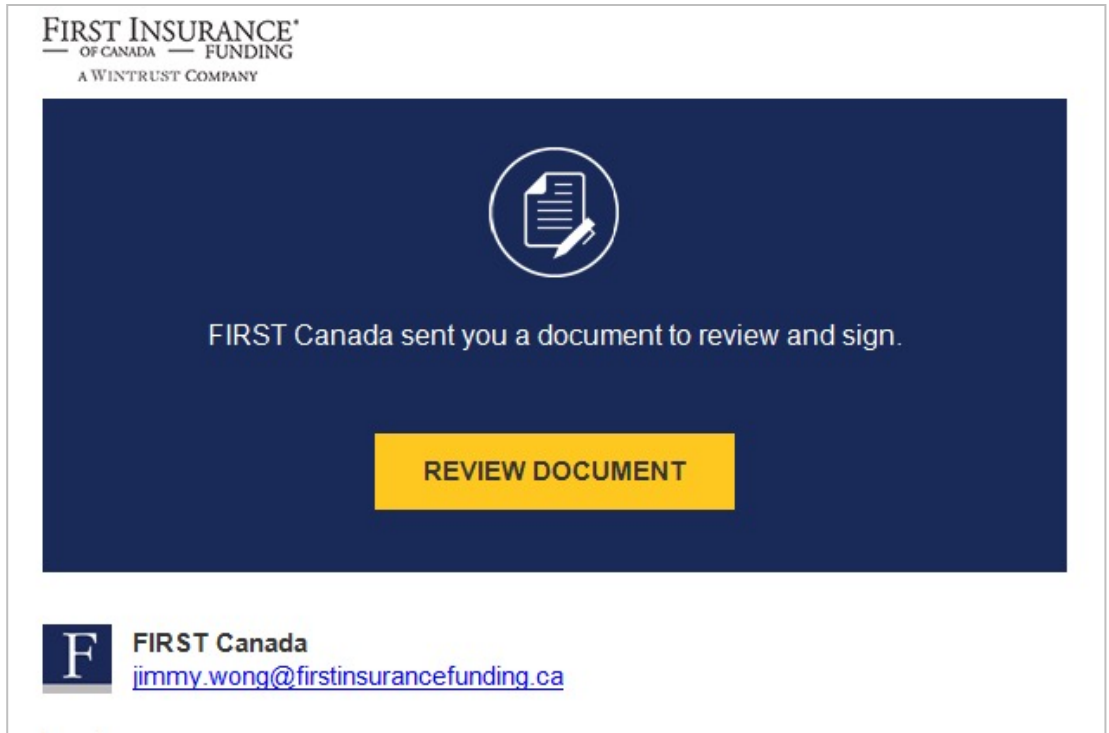
# eSignature | Client Process

Conveniently Sign Agreements  
Anywhere ▶ Anytime

**eSignature**

# Broker Signature

- › Once insured signs the Premium Finance Agreement (PFA), you will receive an email to access the document and complete the process
- › Click **Review Document** to proceed



# Broker Signature

- › Click **Continue**

**Please Review & Act on These Documents**

**FIRST Canada.**  
FIRST Insurance Funding of Canada.

Thank you for choosing FIRST Insurance Funding of Canada.

[View More](#)

**FIRST INSURANCE**  
OF CANADA — FUNDING  
A WELLSFARGO COMPANY

Powered by **DocuSign**

Please review the documents below.

**CONTINUE**    **OTHER ACTIONS ▾**

4490 Second Street  
Suite 100  
Ottawa, ON K6H 3B7

**Please complete the form below and return to your broker.**  
Transactions related to this payment plan will appear on your bank statement as Best Insurance. Please be advised that any outstanding down payment, application fee, and/or past due installments at the time of contract acceptance will be debited within 2 business days. Please provide your email and cell phone number. This information is only used to communicate with you regarding this payment plan.

Insured Email:

Insured Phone Number:

Attach a VOID cheque or complete the banking information below:

Account Holder Name:

Branch Transit Number (5 digits):

Financial Institution Bank Number (3 digits):

Bank Account Number (Up to 14 digits):

Cheque Sample:

Easy monthly payment

Flat Rate	1.66%
Number of Installments	10
First Payment Due Date	27-Nov-2025
Currency	CAN
Line of Business	Commercial
Installment Amount	
<b>\$1,828.66</b>	



- › A Payment Options Form will display, including the information entered by insured. Click **Start**

Please review the documents below. FINISH OTHER ACTIONS ▾

Sign Envelope ID: ABC4FF6A-DF66-4E89-ADDF-2FBAC82CE727

**FIRST INSURANCE**  
OF CANADA — FUNDING  
A TRUST COMPANY

Invoice Date:  
01-Dec-2025

Insured/Borrower:  
ABC Company

Your Insurance Broker:  
**Best Insurance Brokers Inc. - Ottawa**  
4490 Second Street  
Ottawa, ON K6H 3B7

Please complete the form below and return to you broker.

Transactions related to this payment plan will appear on your bank statement as FIRST Ins. Fund. Please be advised that any outstanding down payment, application fee, and/or past due installments at the time of contract acceptance will be debited within 2 business days.

Please provide your email and cell phone number. This information is only used to communicate with you

Insured Email:  
marketing@firstinsurancefunding.ca

DEMONSTRATION DOCUMENT ONLY  
PROVIDED BY DOCUSIGN ONLINE SIGNING SERVICE  
Web Site: www.docuSign.com | Support: 1 (800) 219-0200

**Payment Details**

Policy Payments ID  
**152231**


Broker Reference	
Total Premium	\$21,600.00
Down Payment	\$3,672.00
Application Fee	\$0.00
Finance Charge	\$358.60
Fiat Rate	4.34%
Number of Installments	10
First Payment Due Date	27-Nov-2025
Currency	CDN
Line of Business	Commercial

Installment Amount  
**\$1,828.66**

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- › Answer the down payment questions and click **Next**

Cheque Sample:



Are you retaining the down payment? Yes  No

Are you keeping any additional amount? Yes  No

If no, enter \$0. Otherwise, enter the amount retained:

Additional comments:

Easy monthly payment plans provided by

**FIRST INSURANCE**  
OF CANADA — FUNDING  
A TRUST COMPANY




› Click **Sign**

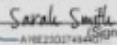
› Review signature. Click **Adopt and Sign**

› Your signature appears in the document. Click **Finish**

consent to any party (other than those required to be given by FIRST); and not for a term or less than one year or subject to any other terms; and have not been paid for other than as described herein. 12) Broker will promptly remit all funds received from FIRST and the Insured for the Policies due to the insurers issuing such Policies; and 13) Broker is not an agent of FIRST and is not authorized to bind FIRST and has not made any representation to the contrary.

By  Sarah Smith Broker Date 1/17/2020  
(Signature of Broker) (Name and Title)

**Acceptance by Insured**  
The Insured has received a copy of the Agreement and read it in its entirety. Upon execution of this Agreement, Insured(s), jointly and severally if more than one, acknowledges and agrees to all terms and provisions herein. If the Insured is not an individual, the undersigned is authorized to sign this Agreement on behalf of all Insured Insureds. The Insured is not required to enter into this financing arrangement as a condition for obtaining insurance.

By  Sarah Smith ABC Date 1/17/2020  
(Signature of Insured) (Name and Title)

Select the sign field to create and add your signature

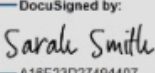
### Adopt Your Signature

Confirm your name, initials, and signature.  
\* Required

Full Name\* Sarah Smith Initials\* SS

**SELECT STYLE** DRAW

PREVIEW [Change Style](#)

DocuSigned by:  DS  
-A16E23D27494407... SS

By selecting Adopt and Sign, I agree that the signature and initials will be the electronic representation of my signature and initials for all purposes when I (or my agent) use them on documents, including legally binding contracts - just the same as a pen-and-paper signature or initial.

**ADOPT AND SIGN** CANCEL

152231.pdf 3 of 3


**FINISH**

Powered by **DocuSign** | [Change Language - English \(US\)](#) | Copyright © 2020 DocuSign Inc. | v2R

# Paperless Process Complete

- › Upon completion, FIRST Canada will be automatically notified of the completed submission. Notice of Acceptance (NOA) will be sent to the broker and client once the contract is processed

FIRST INSURANCE<sup>®</sup>  
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A WINTRUST COMPANY



Your document has been completed

[REVIEW DOCUMENT](#)

**F** FIRST Canada  
[uat@firstinsurancefunding.ca](mailto:uat@firstinsurancefunding.ca)



All signers have completed and signed the FIRST Canada Premium Finance Agreement (18192).

Questions? Contact the FIRST Canada Client Services at

**No more printing, scanning, or emailing necessary  
with new paperless workflow**

# Search for a Quote


- › Enter any required info into one of the Search fields and click **Search**

Currency: CAD  Français  Logout

**FirstInSite** Lite

Quotes Renewals Accounts Additional Premium Contact Us

### Create a new quote



Start >

### Search for a Quote



Name

Quote Number  Customer ID

Search >

# Search for a Quote

- › A list of matching results will be displayed
- › Select the quote you wish to access by clicking on that specific quote line

Currency: CAD  Français  Logout

**FirstInSite** Lite

Quotes Renewals Accounts Additional Premium Contact Us

### Search for a Quote

Name  Quote Number  Customer ID  [Search >](#)

Quote Number	Name	Quoted By	Quoted Date	Total Premium	Down Payment	Number of Installments
<a href="#">↓</a> 35634	Jane Doe	James Holden	02/03/2021	1,200.00	204.00	10
<a href="#">↓</a> 35626	BC Renewal Test	James Holden	02/03/2021	1,509.99	309.99	9
<a href="#">↓</a> 35618	BC Renewal Test	James Holden	02/03/2021	1,509.99	309.99	9
<a href="#">↓</a> 35600	BC Renewal Test	James Holden	02/03/2021	1,509.99	309.99	9
<a href="#">↓</a> 35592	BC Renewal Test	James Holden	02/03/2021	1,509.99	309.99	9
<a href="#">↓</a> 35584	BC Renewal Test	James Holden	02/03/2021	1,509.99	309.99	9

494 items 1 2 3 4 5 6 7 8 9 10 ... > >>



# 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

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1 888 232 2238

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

[firstinsurancefunding.ca/contact-us](http://firstinsurancefunding.ca/contact-us)