

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

First InSite *Enhanced*

Soumettre une soumission

Soumettre une soumission

Sujets couverts dans ce guide:

1. Soumettre une soumission
2. Trucs

Identification

- › Cliquez sur le bouton **First InSite Enhanced**
firstinsurancefunding.ca
- › Identifiez vous à l'aide de votre nom d'utilisateur (adresse courriel) et le mot de passe temporaire qui vous a été fourni dans le courriel de bienvenue
- › Sélectionner **Quote Search**

Login here

First InSite
Enhanced

in First-U.S. English Contact Us Français

First INSURANCE[®]
OF CANADA — FUNDING
A WINTRUST COMPANY

Quotes Accounts Renewals

Account Search

Quote Search

Additional Premium Quote Additional Premium Quote Search

Reports Complete Quote

Soumettre une soumission

- › Sélectionnez **Specific Quotes**



TRUC: Les soumissions qui débutent avec un P doivent aussi avoir leurs détails intégrés

FirstInSite

Search

Quote #: Name:
Address: City:
Region: Postal Code:
Customer ID:

Specific Quotes: **All Quotes** ▼

			Quoted Date	Total Premium	Down Payment	# Pay
		Payment Options	04/23/2017	25,050.00	12,537.50	10
		Payment Options	04/23/2017	25,050.00	4,279.25	10
		Payment Options	04/23/2017	25,050.00	4,279.25	10
		Payment Options P3509	04/23/2017	25,050.00	2,167.14	11
		Payment Options 3483	02/17/2017	3,400.00	578.00	10
		Payment Options 3475	02/17/2017	10,000.00	1,700.00	10
		Payment Options 3467	02/17/2017	7,000.00	1,190.00	10
		Payment Options P3434	02/17/2017	12,000.00	2,040.00	10
		Payment Options 3400	02/17/2017	2,400.00	408.00	10
		Payment Options 3392	02/17/2017	7,000.00	1,190.00	10
		Payment Options 3384	02/17/2017	20,000.00	3,400.00	10
		Payment Options 3228	01/31/2017	21,600.00	3,672.00	10
		Payment Options 3202	03/02/2016	21,600.00	3,672.00	10
		Payment Options P3194	03/02/2016	21,600.00	3,672.00	10
		Payment Options 3137	02/11/2016	27,000.00	4,590.00	10
		Payment Options 3129	02/11/2016	27,000.00	4,590.00	10
		Payment Options 3046	02/11/2016	27,000.00	4,590.00	10
		Payment Options P2642	02/11/2016	81,000.00	13,770.00	10
		Payment Options P2634	02/11/2016	81,000.00	13,770.00	10

90 Items

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

› Cliquez sur **Edit** pour ouvrir la soumission

› Confirmez les informations de l'assuré



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

Quote - 3202 - RVN Technologies Inc.

Customer Information Policies Terms Summary Documents

Quoting for: A00003 - Best Insurance Brokers Inc. Ottawa, Ontario

Name & Address		Contact	
Name:	RVN Technologies Inc.	Main Phone:	
		Contact:	
Address:	4665 Victoria St. Nort	E-Mail:	
		Main Fax:	
City:	Ottawa		
Country:	Canada		
Province/Postal:	ON - Ontario	K1W 0A2	
Additional Addresses			
Email Notices to Customers:	<input type="checkbox"/>		
Customer ID:			

General Loan Information

Brokerage:	A00003 - Best Insurance Brokers Inc.	Line of Business:	Commercial
Pricing Program:	17% Down, 10 Installments	Preferred Language:	English
Terms:	17% Down, 10 Installments	New/Renewal:	New
Standard/Continuous Pay:	Standard		
Origination Code:			
Broker Contact:	sarah.smith@bestinsurance.ca - Sarah Smith		
Broker Phone:	(416) 785-7456		
Broker Email:	melissa.dinardo@firstinsurancefunding.ca		

Edit Close

- › Entrez le numéro de police et le type de couverture
- › Entrez l'information sur l'assureur et/ou grossiste
- › Entrez le montant de la prime, les frais et les taxes et cliquez sur **Save**

Quote Entry - 3236 - RVN Technologies

Customer Information Policies Terms							
Policy #	Eff Date	Carrier	Coverage	Premium	Em Fees	Tax Fees	Total
<input checked="" type="checkbox"/> 1	TBI	04/08/2016	GL	20,000.00	0.00	1,600.00	21,600.00 ✕

New Policy 21,600.00

Policy Details

Policy Number: CHUBB57757 Coverage: GL GENERAL LIABILITY

Effective Date: 04/08/2016 Policy Term (Months): 12

Carrier: C00004 Chubb Insurance Company of Canada

MGA:

Premium: 15,000.00 Return Method: Short-Rate

Policy Fees: 0.00 Min. Earned Premium: 0.000 %

Taxes: 1,200.00

Total Amount: 16,200.00

View Authorities Cancel **Save**

< Back Cancel Next >

- > Si tout est correct, cliquez sur **Save**

Quote Entry - 3236 - RVN Technologies

Customer Information Policies Terms			
Quote Variables			
Governing Province	Ontario	Earned Broker Fee:	0.00
First Payment Due Date:	04/09/2016	Financed Broker Fee:	0.00
Billing Cycle:	Monthly	Down Payment:	17.000 % 3,672.00
Billing Method:	Pre-authorized Chequing	No. of Installments:	10
Disbursement Delay:	30 Days	APR:	10.990 %
Rate Chart:	Best Insurance Rate Plan		
		Reset to Defaults	Recalculate
General		Financials	
Governing Province	Ontario	APR:	10.990 %
First Payment Due Date:	04/09/2016	Flat Rate:	4.238 %
Billing Cycle:	Monthly	Total Premium:	21,600.00
Billing Method:	Pre-authorized Chequing	Down Payment:	17.000 % 3,672.00
Disbursement Delay:	30 Days	Amount Financed:	17,928.00
Rate Chart:	Best Insurance Rate Plan	Finance Charge:	915.40
Equal Pay Quote:	No	Total of Payments:	18,843.40
Earned Broker Fee:	0.00	No. of Installments:	10
Financed Broker Fee:	0.00	Installment Amount:	1,884.34
< Back		Submit	Save
			Cancel
			Next >

> Cliquez **Submit**

Quote Entry - 3236 - RVN Technologies

Customer Information Policies Terms **Summary** Documents

Quote Variables

Governing Province	Ontario	Earned Broker Fee:	0.00
First Payment Due Date:	04/09/2016	Financed Broker Fee:	0.00
Billing Cycle:	Monthly	Down Payment:	17.000 % 3,672.00
Billing Method:	Pre-authorized Chequing	No. of Installments:	10
Disbursement Delay:	30 Days	APR:	10.990 %
Rate Chart:	Best Insurance Rate Plan		

Reset to Defaults Recalculate

General		Financials	
Governing Province	Ontario	APR:	10.990 %
First Payment Due Date:	04/09/2016	Flat Rate:	4.238 %
Billing Cycle:	Monthly	Total Premium:	21,600.00
Billing Method:	Pre-authorized Chequing	Down Payment:	17.000 % 3,672.00
Disbursement Delay:	30 Days	Amount Financed:	17,928.00
Rate Chart:	Best Insurance Rate Plan	Finance Charge:	915.40
Equal Pay Quote:	No	Total of Payments:	18,843.40
Earned Broker Fee:	0.00	No. of Installments:	10
Financed Broker Fee:	0.00	Installment Amount:	1,884.34

Submit Edit Close Payment Option

On Line Account Submission Process

Customer Name:	RVN Technologies	Total Account:	21,600.00
Interest Charge Total Due:	915.40	Amount of Deposit:	3,672.00
Term:	10	Amount of Installments:	1,884.34

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

Is your Brokerage keeping the down payment?

Yes No

Confirmez le paiement initial ou tout autre montant retenu

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

Additional amount retained by the brokerage:*

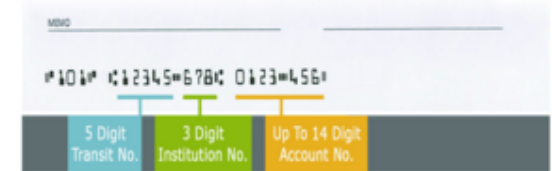
* If applicable, enter the dollar amount that the broker has retained in addition to the down payment amount.

Complete Cheque Information:

Entrez l'information bancaire de l'assuré

Account Holder Name:	RVN Technologies
Institution Number:	004
Financial Institution Name:	TD Canada Trust
Bank Transit:	47836
Account Number:	1234567

Cheque Sample



Upload image of signed Payment Options Form

Choose file Téléchargez l'Entente de financement de prime et le spécimen de chèque

Files
cheque image_2015_2.jpg (642KB) [remove](#)

or check here The signed Payment Options Form will be emailed to clientservices@firstinsurancefunding.ca or faxed to 888 232 2209.

Account Submission Note:

(Optionnel) Si vous avez des instructions spéciales, entrez une Note de soumission de prêt

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

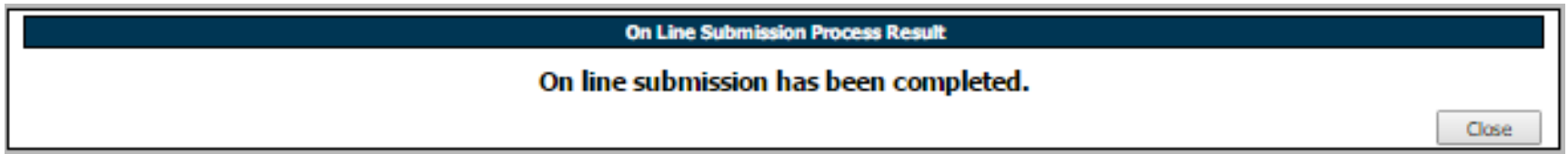
AGENT OR BROKER REPRESENTATIONS Aucune signature, courriel ou fax sont requis; uniquement à cliquer pour approuver

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.

Cliquez sur **Complete on line submission**

- › Recevez la confirmation que votre contrat a été soumis pour traitement



Trucs

1. Votre identifiant est maintenant votre adresse courriel
2. Les informations pour l'identification vous seront envoyées par courriel dans les 5 jours ouvrables suivant la formation
3. Accédez à l'ancien système de soumission uniquement pour la gestion des prêts existants
- Endossements, demandes de financement, avis, etc.
4. Les renouvellements seront disponibles dans le nouveau système
5. Les guides de formation, vidéos, FAQs et webinaires sont disponibles sur notre site internet- Visitez l'onglet First InSite Amélioré

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