FIRST INSURANCE® OF CANADA FUNDING

A WINTRUST COMPANY

First Connect™

Frequently Asked Questions

How do I access First Connect™?

As a First Connect™ partner, you are provided with a link that is integrated directly into the quoting tool used by your office. Accessing First Connect™ is as simple as following the link provided. If you are not currently a First Connect™ partner and are interested in more information, please contact your First Connect™ Sales Team.

Is training available for First Connect™?

We would be happy to provide First Connect™ training for your office. Contact your First Connect™ Sales Team to set up a time that is convenient for you.

What if a broker doesn't appear in the dropdown list?

To request the addition of a new broker please contact FIRST Canada Client Services at: 1 888 232 2209 or clientservices@firstinsurancefunding.ca

What if I don't know who the broker contact is?

There is a generic contact setup for every office called Connect [Name of brokerage]. Please select this contact as a placeholder.

Can I quote multiple policies?

Yes. Select "Add another policy" to easily break down the total premium into various policies. All policy details can be added including Policy Number, Coverage Type, Effective Date, Minimum Earned Premium and Policy Fees. Please note, the sum of all policies must equal the Total Invoice Amount.

What if a quote is outside our pre-approved terms?

As a First Connect™ partner, you have access to preferred rates with pre-approved terms. Should your quote request be outside of those terms, an automatic quote request will be sent to your Account Manager for review and they will contact you with a quote.

How is account maintenance handled during the life of the loan?

The dedicated team at FIRST Canada will manage all account maintenance in conjunction with the broker of record. We will send you a notice detailing any changes to the loan, including endorsements and cancellations. Should you need to notify FIRST Canada of a cancelled policy, endorsement, address change, etc., please contact FIRST Canada Client Services at: 1 888 232 2209 or clientservices@firstinsurancefunding.ca.

What happens if there is a cancellation?

Should you need to notify FIRST Canada of a cancelled policy, please contact FIRST Canada Client Services at: 1 888 232 2209 or clientservices@firstinsurancefunding.ca. Any policies cancelled by FIRST Canada will be handled through our dedicated Recovery team and your office will receive a Notice of Cancellation.

What happens if there is a negative or positive endorsement?

Endorsements are managed between FIRST Canada and the broker of record. Once an endorsement has been processed, your office will receive a Notice of Endorsement.

A broker has sent a signed Premium Finance Agreement, cheque, or down payment to our office. What do I do with it?

Please notify the broker immediately and return all documents to the broker. It is the broker's responsibility to remit all paperwork and cheques directly to FIRST Canada. You simply provide the quotes and we will handle the rest so you can focus on your core business.

What if a broker or client asks me a question about payments or an existing payment plan?

Please direct them to contact FIRST Canada Client Services at: 1 888 232 2209 or clientservices@firstinsurancefunding.ca