FIRST INSURANCE® FUNDING OF CANADA
A WINTRUST COMPANY

FirstInSite Reference Guide

The First InSite quick reference guide allows you to leverage all that First InSite has to offer you and your clients.

Connect to flexible payment options for all your commercial clients including pay in full, easy monthly payments, and credit cards, with pre-approved terms and competitive rates. First InSite allows you to easily create monthly payment plans, process renewals, and manage your accounts including; processing endorsements, printing payment schedules, and inquiring on funding details.

FirstInSite

Simple 3-Step Process

1. Create

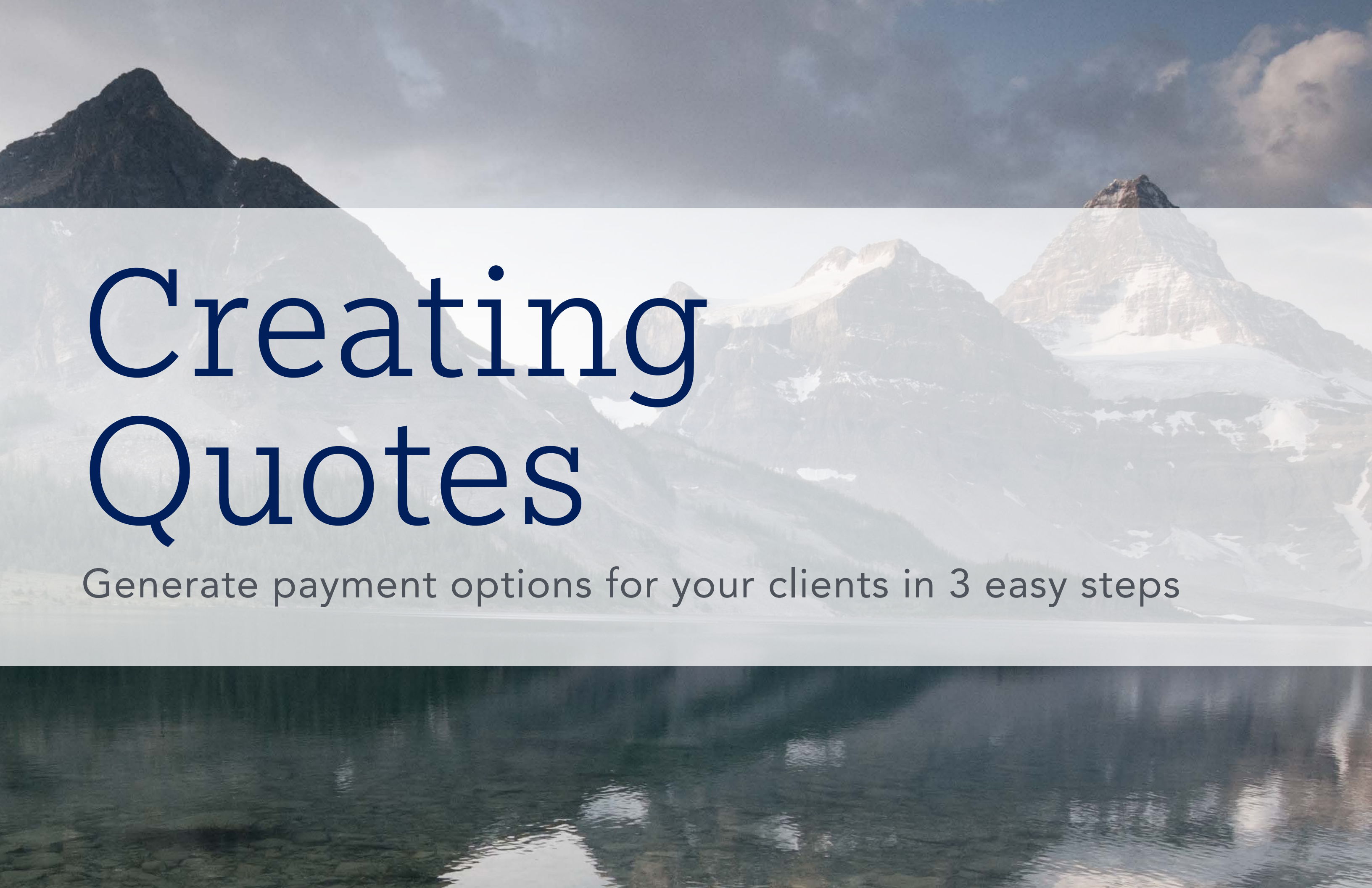
Simple Login. Complete
basic premium information only.

2. Offer

Provide payment options for all your
clients. Pay in full, credit card,
monthly payments.

3. Complete

Complete policy & finance information.
Upload to process.



Creating Quotes

Generate payment options for your clients in 3 easy steps

Provide Payment Options

Create flexible payment options for all your clients including pay in full, easy monthly payments, and credit cards, with pre-approved terms and competitive rates.

Tip: Providing payment options for *all* your clients gives your clients options, improves your receivables, and helps increase your retention.

1. Enter Client Info

- Login to firstinsite.ca
- Select and existing client from the drop-down list or select "New" to add a new client
- Review or enter the insured's information and click "Save Insured Details"

2. Enter Premium Info

- Enter the required premium information and click "Next"
- Always enter a value in the amount fields, even if a zero is required
- Remember, policy fees and minimum earned will be applied to the down payment

3. Enter Pricing Info

- Select the pricing program
- Coverage details are optional at this stage
- Choose the withdrawal date
- Select continuous pay, if required
- Print or email the quote with a simple click

Submitting Loans

Reduce administrative paperwork with online submissions

Completing the Easy Monthly Payment Option

Online loan submission is more secure and efficient with faster approvals and notices of acceptance.

Tip: No need to sign, email, or fax a broker's signature, when submitting online.

1. Complete

- Login to firstinsite.ca
- Select the "Account Submission" tab
- Click "Submit Account"

2. Coverage + Pricing

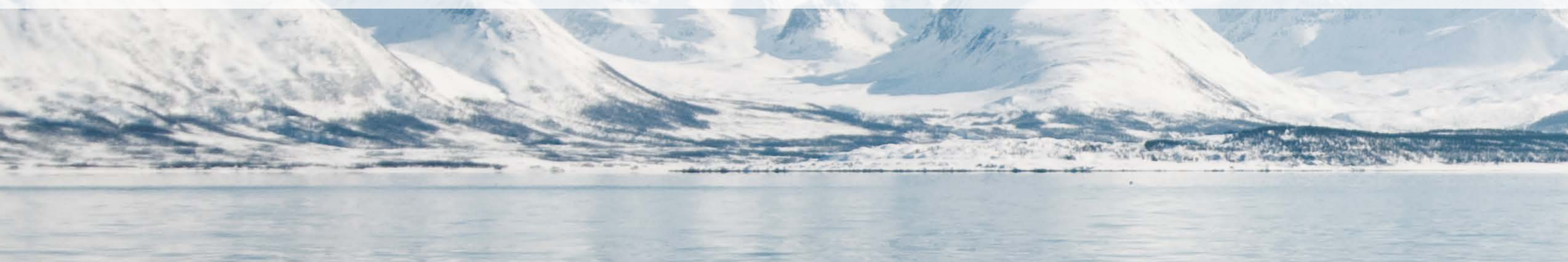
- Add broker or policy fees, if applicable
- Enter coverage details
- Enter multiple markets, if required
- Remember to click the + symbol to apply the markets
- The markets' premium amount must equal the total policy premium amount

3. Upload

- Confirm the down payment
- Enter / update the insured's banking details
- Upload the void cheque and signed PFA
- Select the checkbox to agree to the Agent or Broker representations
- Record your Loan ID#

Processing Renewals

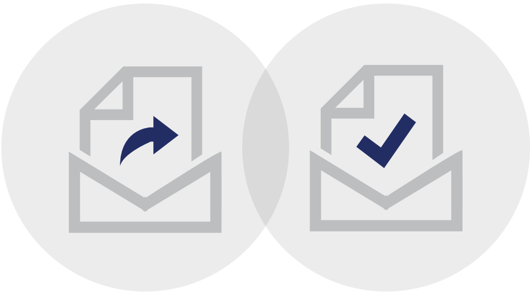
Renewals are even easier, faster, and paperless



Simplified Renewals

Renew your clients' easy monthly payments with a few simple clicks. Choose to send a copy to your client for approval or instantly submit for streamlined renewal processing.

Tip: *Evergreen* client signature - no need for client signature on renewals



1. Premium

- Login to firstinsite.ca
- Click on the "Summary Dashboard" tab
- Click the number of accounts next to "Accounts Eligible For Renewal" or use the search fields

2. Coverage + Pricing

- Update the premium information
- Select the pricing program
- This step is exactly the same as when obtaining a quote.

3. Present

- Select "Proceed" to submit the renewal for processing
- This finalizes the contract and sends for processing
- You will receive a loan submission ID #
- You and your client will receive an NOA

or

3. Proceed

- Select "Save and Print" if you wish to send a copy to your client
- Come back to First InSite and submit the renewal once your client accepts

Managing Accounts

Easily update client information and review funding details

Easily Manage Your Client Account Details

Manage everything from processing endorsements, producing a schedule of payments for your clients, or exporting a detailed funding report.

Tip: You control the management of your accounts and your clients.

Process Endorsements

- Select "AP Request" (Additional Premium Request) to enter a positive endorsement
- Select "RP Request" (Returned Premium Request) to enter a negative endorsement
- Click "Submit Request"

Print Payment Schedules

- From the "Summary Dashboard" click "Accounts"
- Find the account via the list or use the search fields
- Click on the ID number in the "Account #" column for the selected client
- Click on "Account Summary"
- Save or print the PDF and share with your client

Inquire

- Inquire or update your client's contact information or address
- Inquire or update your client's banking information
- Review your clients policy details

Account Funding Details

- Click on "Search Account Funding Details"
- Search via funding status, portfolio or start and end dates
- View the list or export to excel

We invite you to contact a member of your dedicated service and support team.

clientservices@firstinsurancefunding.ca
1 888 232 2238
firstinsurancefunding.ca

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