FIRST INSURANCE® FUNDING OF CANADA
A WINTRUST COMPANY

# First Connect®

First Connect® is the market-leading payment solution platform designed specifically for our valued MGA and carrier partners and their brokers.

Our First Connect® platform enables you to seamlessly provide your brokers with point-of-sale payment solutions for their clients.

As a FIRST Canada partner, you can now enjoy the benefits of an enhanced First Connect® platform including a modern design and user-friendly interface.

In addition, you now have the **ability to add multiple policies** to a single quote, reducing data input and enabling a streamlined workflow and easier reconciliation for back office efficiency.

**Offer your brokers the convenience of:**

- Pre-approved terms
- Competitive rates
- Flexible payment options

At the same time, you'll enjoy the benefits of increased close ratios, reduced workload, and differentiating your value to your clients.

## Offer Paperless Payment Options

Your brokers and their clients now have the ability to sign their premium finance agreements securely online with **eSignature**.

Add value by offering the convenience of signing contracts anytime, from anywhere, on any device.

"We pride ourselves on listening to our partners and delivering product improvements that the industry wants and needs.

We are pleased to provide our MGA and carrier partners with an enhanced First Connect® platform to better service their brokers."

**Stuart Bruce**, CEO
FIRST Insurance Funding of Canada

## Together, we have more to offer

We are proud to partner with you in bringing these innovative payment solutions to the Canadian insurance market. **Differentiate the value** you bring by presenting **comprehensive payment solutions** to all your clients.

## Contact your dedicated First Connect® Sales Team today

**Tas Kurji**
Vice President
Industry Relations and Strategic Partnerships
604 351 5266

**Michael Byrne**
Senior Relationship Manager
647 624 1966

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# 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