

FIRST INSURANCE®
— OF CANADA — FUNDING
A WINTRUST COMPANY

First InSite Lite™

Quotes

Quotes

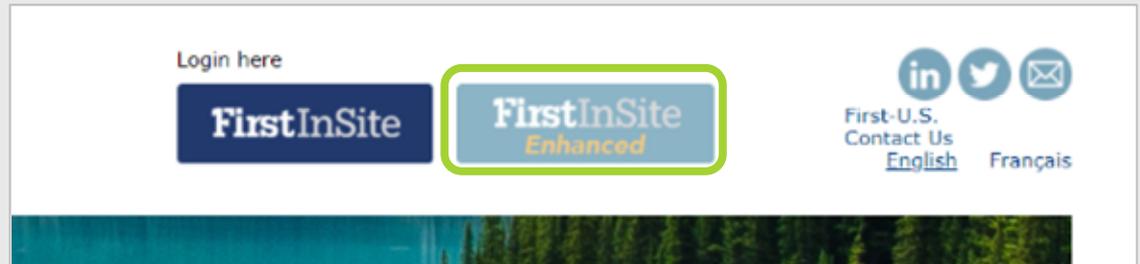
Topics covered in this guide:

1. Create a Quote
2. eSignature with DocuSign
3. Search for a Quote
4. Tips

Login

- › Click on the **First InSite Enhanced login button**
firstinsurancefunding.ca

- › Login with your user name (email address) and temporary password provided in your welcome email

A screenshot of the "First InSite" Broker Login page. The page header includes the "FIRST INSURANCE OF CANADA FUNDING A WINTRUST COMPANY" logo. Below the header is a grey bar with the "First InSite" logo. The main content area is dark blue and contains the "Broker Login" heading. There are two input fields: "User Name:" with the value "sarah.smith@bestinsurance.ca" and "Password:" with masked characters. Below the password field are links for "Forgot Password" and a "Login" button.

Create a Quote

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

The screenshot displays the FirstInSite Lite web application 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 bar includes 'FirstInSite Lite' and menu items for 'Quotes', 'Renewals', 'Accounts', and 'Contact Us'. The 'Quotes' menu item is highlighted. Below the navigation, there are two main sections: 'Create a new quote' and 'Search for a Quote'. The 'Create a new quote' section features an icon representing a person, a list, and a dollar sign with a plus sign, and a 'Start >' button. The 'Search for a Quote' section includes input fields for 'Name', 'Quote Number', and 'Customer ID', and a 'Search >' button.

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

The screenshot displays the 'FirstInSite Lite' web application interface. At the top, it shows 'Currency: CAD' with a Canadian flag icon, and navigation links for 'Français' and 'Logout'. The main navigation bar includes 'FirstInSite Lite', 'Quotes', 'Renewals', 'Accounts', and 'Contact Us'. The 'Quotes' section is active and contains three dropdown menus: 'Type' (set to 'Quote'), 'Contract' (set to 'Regular'), and 'Line of Business' (set to 'Commercial'). Below this is the 'Client' section with several input fields: 'Company Name' (ABC Company), 'Contact Name' (John Smith), 'Address' (123 Any Street), 'City' (Toronto), 'Province' (ON), 'Postal Code' (A1A 1A1), 'Country' (Canada), 'Email' (john.smith@abc.com), and 'Phone Number' (555-555-5555). On the right side of the 'Client' section, there are two more dropdown menus: 'Document Language' (set to 'English') and 'Broker Reference' (set to '0001').

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	Total Premium	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	Total Premium	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 **payment 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, ON, 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"/>	
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"/>

[< Back](#)

[Create Payment Options](#)

Policy Payment Options

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

Payment Options

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 using your
Policy Payments ID:
157230

Payment Options Form

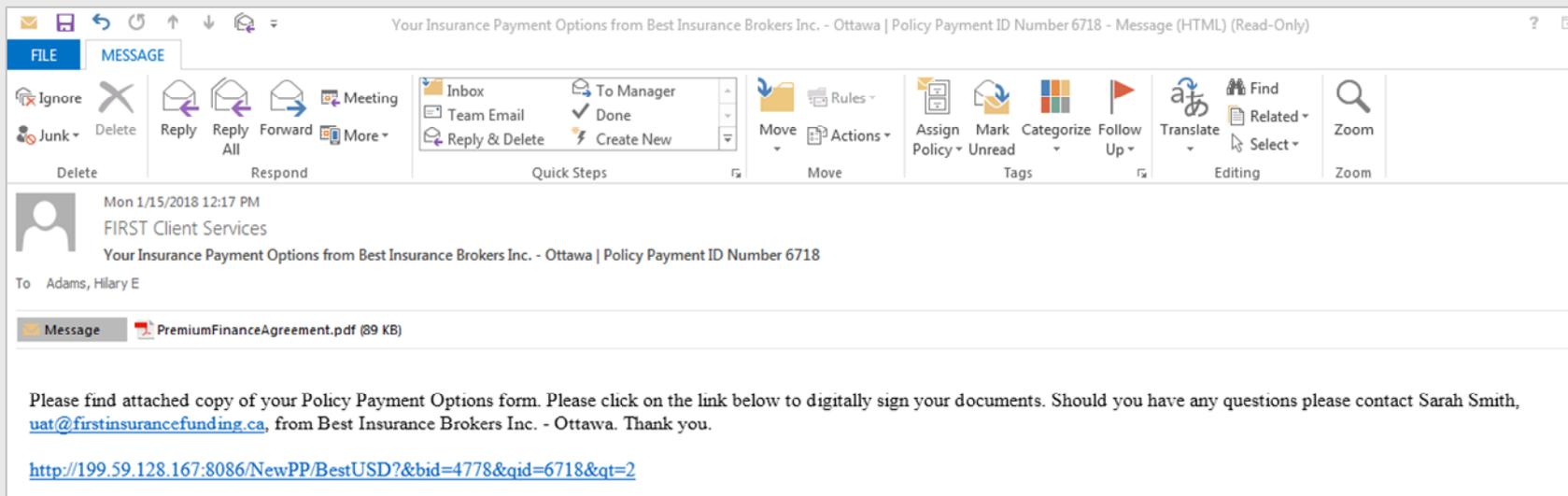
Monthly Payment Plans	Cost
-----------------------	------

Client Email Address:

Print Email to self Email to self & client Email to client

Policy Payment Options

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



The screenshot displays an email client interface. The title bar reads "Your Insurance Payment Options from Best Insurance Brokers Inc. - Ottawa | Policy Payment ID Number 6718 - Message (HTML) (Read-Only)". The interface includes a ribbon with "FILE" and "MESSAGE" tabs, and various action buttons such as "Delete", "Reply", "Forward", "Move", "Assign Policy", "Mark Unread", "Categorize", "Follow Up", "Translate", "Find", "Related", and "Select". The email content shows a sender profile for "FIRST Client Services" and a subject line "Your Insurance Payment Options from Best Insurance Brokers Inc. - Ottawa | Policy Payment ID Number 6718". The recipient is "Adams, Hilary E". An attachment is listed as "PremiumFinanceAgreement.pdf (89 KB)". The main body of the email contains the following text:

Please find attached copy of your Policy Payment Options form. Please click on the link below to digitally sign your documents. Should you have any questions please contact Sarah Smith, uat@firstinsurancefunding.ca, from Best Insurance Brokers Inc. - Ottawa. Thank you.

<http://199.59.128.167:8086/NewPP/BestUSD?&bid=4778&qid=6718&qt=2>

Paperless Payment Options

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

Best Insurance Français

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

Insured/Borrower: ABC Company Total Premium: **\$21,600.00**

Payment Options

Select a payment method below.

Monthly Payment Plans

 Monthly Bank Withdrawal	Smooth out your cash flow with easy monthly payments. Click the button to complete the premium finance agreement online or print and complete the attached file and return to your broker.	3.00% Flat Rate
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Full Payment Options

 Credit Card	Pay for your full premium with your credit card. Click on the button to proceed to the secure payment page.	2.97% System Access Fee
 Interac®	Pay for your full premium via Interac®. Click the button and complete your email address. A secure Interac® payment link will be emailed to you.	\$5.00
 Cheque or Money Order	Pay for your full premium by cheque or money order. Click on the button and complete the remittance form. Make cheque or mail order payable to: Best Insurance Brokers Ltd. Please ensure payment arrives prior to your policy effective date. Mail cheque and remittance form to: Best Insurance Brokers Ltd. 4490 Second Street, Ottawa, ON K6H 3B7	No charge
 Online Bill Pay	Pay for your full premium via your financial institutions online banking platform. Sign in to your online banking and add "Best Insurance" as a payee and enter your 7-12 digit policy number.	No charge

Pay in Full - Cheque

- › Upon selecting **Cheque**, directions will appear for the insured to send payment to broker

[Français](#)

PolicyPayments

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

Payment Options - Pay in Full

ABC Company

Send your cheque, along with the Cheque Remittance Form, to:

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

Ensure that your payment arrives prior to the effective date of your insurance.
[Click here](#) to print your cheque remittance form and include it with your payment.

[< Back](#)

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

Pay in Full - Credit Card

- › Upon selecting **Credit Card**, insured will be directed to an encrypted and secure self-serve credit card page to complete their payment

Customer Details

Fill all the required fields to process the transaction

Language English ▼

Invoice Number	Customer Id	First Name	Last Name
<input type="text" value="152207"/>	<input type="text"/>	<input type="text" value="Sarah"/>	<input type="text" value="Smith"/>
Insured Name	Mailing Address		Email Address
<input type="text" value="ABC Company"/>	<input type="text" value="123 Main Street"/>		<input type="text" value="marketing@firstinsurancefunding.ca"/>
City	Province	Postal Code	
<input type="text" value="Ottawa"/>	<input type="text" value="ON"/>	<input type="text" value="A1A 1A1"/>	

Payment Details

Invoice Amount

System access fee

Total

Credit Card Details

Please complete the following details exactly as they appear on your credit card. Do not put spaces or hyphens in the credit card number.

Billing information Differs from Customer Information?

Credit Card number CVV/CVC  

Expiration Month Year This Section should not be required.

I authorize the invoice amount to be charged to the card provided above. Amount will appear on statement as Kixpay Inc

I authorize the System Access Fee amount to be charged to the card provided above. The amount will show on my statement as Insurance Payment System Access Fee. I agree to the refund policy and terms of service. <http://www.systemaccessfee.com>

Please note that System Access Fee Service Fee is collected directly by System Access Fee for the use of its software, service and the secure infrastructure to make this payment to the billing company. This is not a fee for the use of the credit or debit cards.

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Monthly Payments

- › Upon selecting **Monthly Payments**, insured will be directed to DocuSign to initiate eSignature

Please review and sign the Premium Finance Agreement

FIRST Canada..
FIRST Insurance Funding of Canada..

FIRST INSURANCE OF CANADA FUNDING
A WINTRUST COMPANY

Powered by **DocuSign**

Thank you for choosing FIRST Insurance Funding of Canada.

[View More](#)

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	
\$1,828.66	

FIRST INSURANCE OF CANADA FUNDING
A WINTRUST COMPANY

eSignature | Client Process

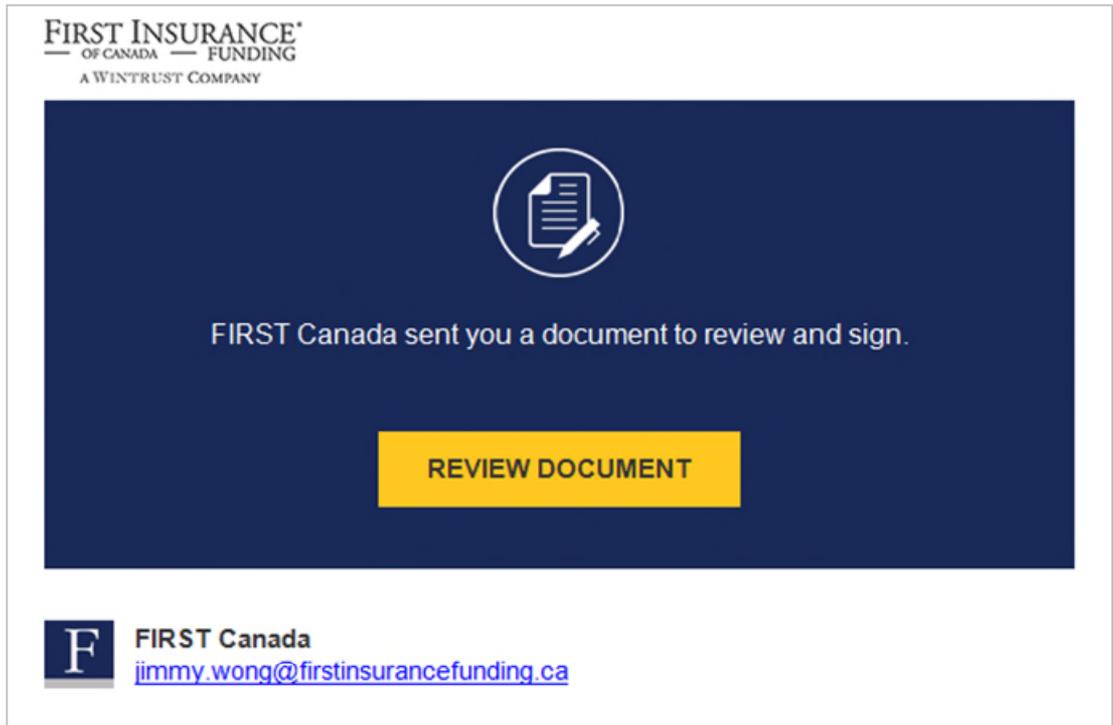
Your Clients

Can Conveniently Sign Agreements
Anywhere  Anytime

eSignature

Broker Signature

- › Once insured signs the Premium Finance Agreement, 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

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

Thank you for choosing FIRST Insurance Funding of Canada.

Your FIRST Insurance Premium Service Agreement is available for signature. We appreciate the opportunity to serve you.
[View More](#)

FIRST INSURANCE[®]
OF CANADA — FUNDING
A WINTRUST 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): <input type="text" value="11111"/>	Financial Institution Bank Number (3 digits): <input type="text" value="111"/>	Bank Account Number (Up to 14 digits): <input type="text" value="111111111111"/>
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Cheque Sample:

Easy monthly payment

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

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

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

› Answer the Down Payment questions and click **Next**

Please review the documents below. **FINISH** OTHER ACTIONS ▾

DocuSign Envelope ID: A9C4FF6A-DF6C-4E89-ADDF-2FBAC82CE727

START

FIRST INSURANCE
OF CANADA — FUNDING
A WINTRUST 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:
[redacted]

DEMONSTRATION DOCUMENT ONLY
PROVIDED BY DOCUSIGN ONLINE SIGNING SERVICE
www.docuSign.com 1-800-368-6868 (toll-free) 1-800-368-6868 (toll-free) 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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NEXT

Cheque Sample:



Easy monthly payment plans provided by

FIRST INSURANCE
OF CANADA — FUNDING
A WINTRUST COMPANY

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:

lanceation to any party (other than notice required to be given by FIRST); are 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 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)

› Click **Sign**

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

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

Select the sign field to create and add your signature

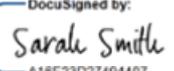
Adopt Your Signature

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

Powered by DocuSign

152231.pdf 3 of 3

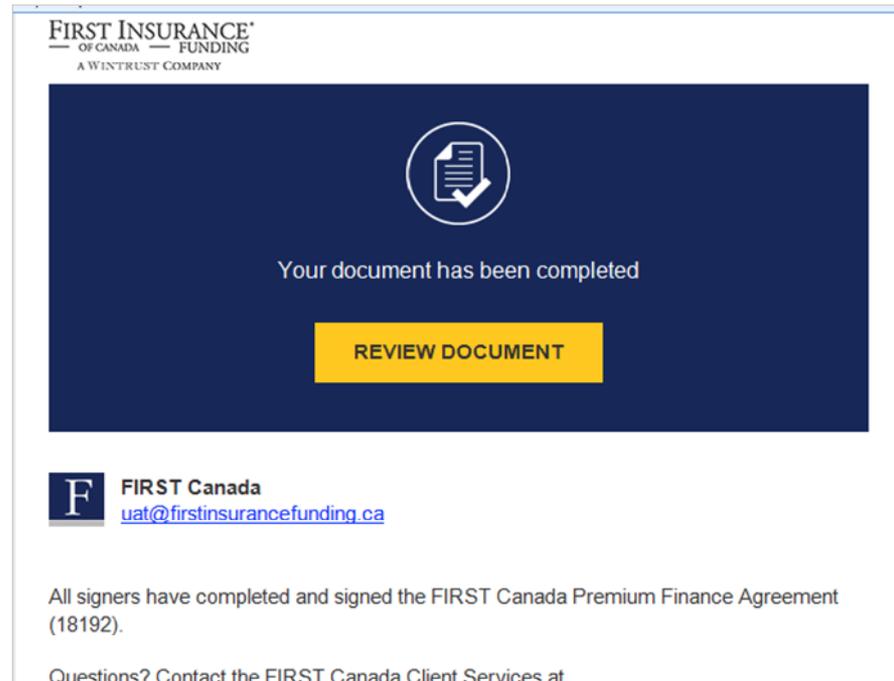
FINISH

Powered by DocuSign

Change Language - English (US) | Copyright © 2020 DocuSign Inc. | 128

Paperless Process Complete

- › Upon completion FIRST Canada will be automatically notified of the completed submission. Notice of Acceptance will be sent to Broker and Client once the contract is processed.



**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**

The screenshot displays the FirstInSite Lite web application 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 bar includes the 'FirstInSite Lite' logo and menu items for 'Quotes', 'Renewals', 'Accounts', and 'Contact Us'. The 'Quotes' menu item is highlighted. Below the navigation, there are two main sections: 'Create a new quote' and 'Search for a Quote'. The 'Search for a Quote' section contains three input fields: 'Name', 'Quote Number', and 'Customer ID'. A 'Search >' button is located at the bottom of this section.

Currency: CAD  Français  Logout

FirstInSite Lite

Quotes Renewals Accounts 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, click on that quote line

Currency: CAD  Français  Logout

FirstInSiteLite

Quotes Renewals Accounts 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
 	P6676	Bulldog Marketing	Test Marketing	01/09/2017	25,000.00	2,500.00	35
 	P6668	Bulldog Marketing	Test Marketing	01/09/2017	25,000.00	2,500.00	35
 	6650	Coca Cola Lite	InSite User1	29/08/2017	5,000.00	850.00	10
 	P6643	Contact Name	InSite User1	29/08/2017	1,000.00	85.60	11
 	6635	Coca Cola Litest	InSite User1	29/08/2017	5,000.00	1,000.00	9
 	6627	Coca Cola Liter	InSite User1	29/08/2017	5,000.00	1,000.00	9

53 items 1 2 3 4 5 6 7 8 9 > >>

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

Contact a member of your dedicated service and support team with any questions or you can reach us at:

clientservices@firstinsurancefunding.ca

1 888 232 2238