



RELIABILITY

GROWTH

INNOVATION

E-NEWSLETTER: WINTER 2013

FIRST INSURANCE®
OF CANADA — FUNDING
A WINTRUST COMPANY

A year in review



The holiday season is upon us and as 2013 comes to an end, I'd like to share with you a recap of the past year as well as some exciting initiatives you can expect to see from FIRST in the new year.

2013 has been a year of further strengthening our strategic partnerships and key initiatives to help you grow your business. In the past year, we focused our efforts on business expansion, broadening our product offering and enhancing our technology platform to serve you better. Since January, we have added eight new members to the FIRST team, most of which operate in a bilingual capacity. This will help ensure that we offer a consistent experience to brokers across the country. In addition, we have further developed our broker loan offering to assist you with financing for a wide variety of business requirements including refinance, acquisition, succession planning, and more.

A bright future ahead

We pride ourselves on our commitment to helping you grow your business. It is that commitment that is at the heart of everything we do. As we move into 2014, we look forward to announcing more exciting initiatives and further earning the privilege of having you as our valued client. Look out for announcements involving our investments in new technology, enhanced product offerings and our participation at various events across the country.

Finally, on behalf of everyone at FIRST, I would like to wish you and your families a safe and happy holiday season. Thank you for your continued support and I look forward to doing business with you in the New Year.

Happy Holidays,

Joe Micallef
CEO, FIRST Insurance Funding of Canada



HOLIDAY OFFICE HOURS

December 24:
8:30 am (ET) to
2:00 pm (local time)
December 25 - 26: Closed
December 31:
8:30 am (ET) to
3:00 pm (local time)
January 1: Closed
January 2:
Regular office hours resume



HAPPY HOLIDAYS

Magic was in the air – and in the crowd

In November, approximately 100 broker partners joined us magical cocktail event at Montreal's trendy nightspot, Newtown Restaurant & Lounge. Guests of this customer appreciation event enjoyed beautiful views from a private terrace, fine food and lively entertainment. Special guest Magicman Farhan wowed the crowd with stunning magical illusions.

The event provided a great opportunity to introduce the newest member of our FIRST sales team, Ghislain Lévesque, Relationship Manager, Quebec & Atlantic provinces. Ghislain has been in the insurance industry for over nine years. Due to his extensive background and experience in the industry, Ghislain was already familiar with many brokers in his region. Ghislain enjoyed the opportunity to reacquaint himself with many brokers throughout the evening and introduce himself to others.

Ghislain is just as excited to working closely with the Quebec and Atlantic region in 2014 as he is for the upcoming holiday season. You can look forward to hearing from Ghislain in the New Year on the many ways he can help you grow your business. In the meantime, Ghislain can be reached via email or phone:
ghislain.levesque@firstinsurancefunding.ca or 438-985-4116



The Dynamics of Service Excellence Road Show

Throughout October and November, the team at FIRST hit the road to deliver The Dynamics of Service Excellence session to broker partners across the country.



The training session, facilitated by Tim Parenti, VP Sales FIRST Insurance Funding Corp., provided information and tools for improving daily interactions with clients and tips for achieving service excellence. In addition to being informative and interactive, the session was also accredited and attendees were pleased to be granted continuing education credits for their participation.

The Dynamics of Service Excellence was well received by all in attendance. [Click here](#) to see what participants had to say about the session.

We are committed to continuing to add value to our partnership through additional value-added services and events such as this and we look forward to providing similar services in the coming year. Contact your [Relationship Manager](#) today to learn about training and education opportunities for your brokerage.

DID YOU KNOW ...

FIRST can offer you loans for an array of business needs including: refinance, acquisition, succession planning and employee buy-in.

- Commercial interest rates as low as Prime (3.00%)*
- Flexible repayment terms from 5 – 15 years
- Tailored security arrangements

[Talk to us today.](#)

*Subject to assessment of risk

GET A CUSTOM FINANCING QUOTE IN JUST MINUTES

Access our 24/7 online, custom quoting tool to get quotes and manage your clients' accounts and renewals more efficiently. Visit firstinsurancefunding.ca for details.

PARTNERING WITH YOU FOR FUTURE SUCCESS

Looking for support with your premium financing or business goals? We're here to help.

[Sumeet Sharma](#)

Eastern Canada

416-300-0328

[Kumar Bhaskar](#)

Western Canada

604-351-5266

Turn write-off into revenue with FIRST – it's not too late!

You can rely on FIRST to help you clear up your year-end receivables and turn write-offs into revenue. Give us the opportunity to provide a convenient finance option for your clients. Use your pre-approved, “no-questions-asked” finance terms and clear up your accounts with minimal administration effort. We can quote on contracts backdated up to 120 days.

Obtain fast and easy quotes today by accessing [Web Quote](#), or by contacting your dedicated Account Executive and we will expedite your requests.



With year end approaching, we can help with all of your receivables, backdated up to 120 days.

[Learn more](#)

FIRST supports the SickKids Foundation

On November 9, 2013, FIRST was proud to participate in an annual indoor volleyball tournament in support of the SickKids Foundation. FIRST employees and broker partners from JDIMI together to raise money for the worthy cause with three teams participating in the tournament. The day was a great success full of teamwork, friendly competition and many laughs. We look forward to contributing to this and other worthy charities throughout our community in the future. If you are involved in a community initiative and are looking for support, we encourage you to contact your [Relationship Manager](#) and let us know.



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Hours: Monday to Friday
8:30 am to 8:00 pm (ET)

Follow us:



UPCOMING EVENTS

January 24 | P&C Crystal Ball
(Toronto, ON)

FIRST CEO, Joe Micallef presents:
*Evolving your Future - More than
Funding for Acquisitions and Perpetuation*

Joe will share his experience in helping the most successful brokerages evolve their future by highlighting the importance of developing a long-term growth strategy. Joe will present the important milestones to consider when developing your strategy - from organic growth to acquisition and eventual perpetuation.

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