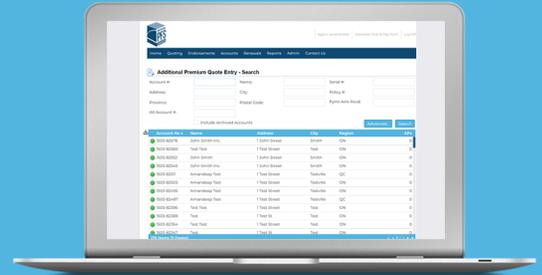




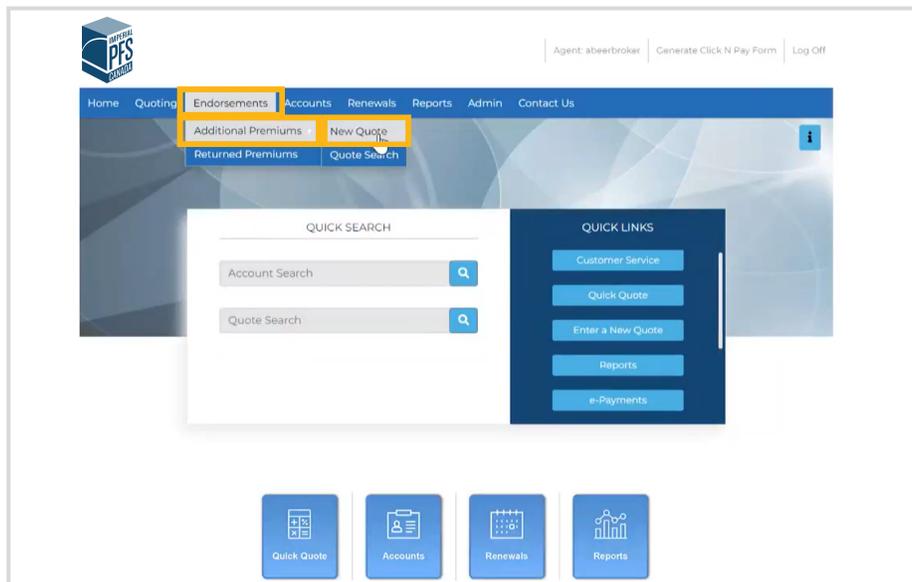
Positive & Negative Endorsements

- ✓ Takes less than 2 minutes
- ✓ Add a new policy or adjust an existing policy
- ✓ Generate revised notice with updated policy schedule



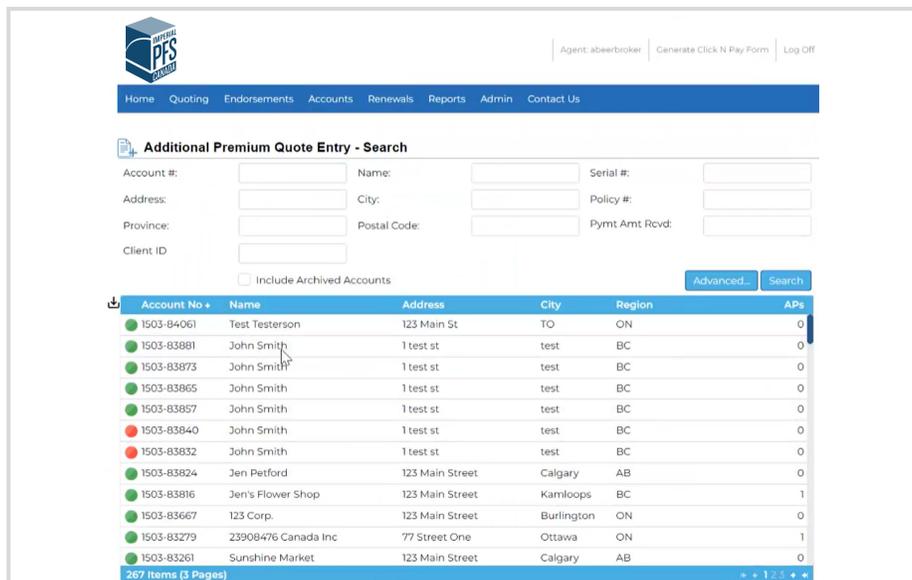
Step 1

From Broker Centre 'Home' page, select 'Endorsements' >> 'Additional Premiums' >> 'New Quote'



Step 2

Search and select the insured from the list.





Positive & Negative Endorsements

Step 3

Here you can see the client's account summary. Click 'Next' to proceed.

Additional Premium Quote Entry - Jen's Flower Shop

Customer Information Policies Terms

| Customer Information | | Summary Financials | |
|----------------------|---|---|-----------|
| Private Label: | Imperial PFS Canada | Total Premium: | 3,403.00 |
| Account Number: | 83816 | Down Payment %: | (8.635 %) |
| Account Holder: | Jen's Flower Shop | Down Payment (incl. Non-Refundable Fees): | 314.86 |
| Main Address: | 123 Main Street Kamloops, BC A2W 6T5 | Amount Financed: | 3,088.14 |
| Main Phone: | (250) 123-4444 | Non-Refundable Fee: | 0.00 |
| Created for: | A00004 - Blue Chip Agency | Finance Charge: | 272.95 |
| | | Total of Payments: | 3,361.09 |
| | | No. of Installments: | 11 |
| | | Original Installment Amount: | Irregular |
| Received Date: | 6/6/2022 | Flat Rate: | 8.02 % |
| Creation Date: | 6/23/2022 | Installments Made/Remaining: | 2 / 9 |
| Created By: | Heather Donohoe | Next Installment Amount: | 310.89 |
| Effective Date: | 5/25/2022 | Next Late Fee Amount: | 15.54 |
| Archive Date: | -- | Shortage: | 51.81 |
| Balance Due Date: | -- | Auto Assessed Late Fee Breakdown | |
| Settlement Date: | -- | Account Balance (inc. fees): | 2,849.82 |
| | | Current Amount Due: | 51.81 |
| First Due Date: | 6/25/2022 | | |
| Next Due Date: | 8/25/2022 | | |
| Final Due Date: | 4/23/2023 | | |

Back Next > Cancel

Step 4

Select either (a) 'New Policy' or (b) 'Add AP to existing policies'

- (a) For a new policy, complete all the fields
- (b) For adding to existing policy, choose policy*, then complete all required fields.

Click 'Save' >> Click 'Next'.

Additional Premium Quote Entry - Jen's Flower Shop

Customer Information Policies Terms

| Policy # | Eff Date | Carrier/MGA | Cover | Premium | Em Fees | Fin Fees | Total |
|----------|----------|-------------------|-------|---------|---------|----------|--------|
| 1 | TBA | APRIL CANADA INC. | CPRP | | | | 0.00 x |

New Policy Add AP to existing policies

Policy Details

Policy Number: TBA Coverage: CPRP Comm Prp

Effective Date: 7/25/2022 Policy Term (Months): 10 Addnl Days to Cancel: 0

Carrier: MGA

MGA: C00020 APRIL CANADA INC., TORONTO

Lead Carrier: C00815 Lloyds of London, MONTREAL

Premium (incl. Taxes): Return Method: Short-Rate

Non-Refundable Fees (incl. Taxes): 0.00 Min. Retained Premium:

Refundable Fees (incl. Taxes): 0.00

Total Amount: 0.00

View Authorities Back Next > Save Cancel

*NOTE:

If adding AP to existing policy, choose a policy from a pop-up window.

Account Details

Policy List

| | | | |
|--------------------|----------------------------|---------------------------|------------------------|
| Loan | Original Loan | Coverage: | CPRP - Comm Prp |
| Policy Number: | TBA | Additional Cancel Days: | 0 |
| Effective Date: | 5/25/2022 (2 months) | UEP Return Method: | Short-Rate |
| Insurance Carrier: | C00815 - Lloyds of London | Premium (Including Fees): | 2,000.00 |
| MGA: | C00020 - APRIL CANADA INC. | | |
| Loan | Original Loan | Coverage: | CL - General Liability |
| Policy Number: | 6y6y6y | Additional Cancel Days: | 0 |
| Effective Date: | 6/1/2022 (2 months) | UEP Return Method: | Short-Rate |
| Insurance Carrier: | C00815 - Aviva Insurance | Premium (Including Fees): | 803.00 |
| MGA: | (unspecified) | | |
| Loan | Additional Premium 1 | | |

3 Items 3,403.00



Positive & Negative Endorsements

Step 5

Review policy and payment details. Click 'Save' to continue.

Additional Premium Quote Entry - Jen's Flower Shop

Customer Information: Policies Terms

| Policy # | Eff Date | Carrier/MGA | Cover | Premium | Em Fees | Fin Fees | Total |
|----------|----------|-------------------|-------|---------|---------|----------|-------|
| TBA | | APRIL CANADA INC. | CPRP | | | | 0.00 |

New Policy Add AP to existing policies 0.00

Policy Details

Policy Number: TBA Coverage: CPRP Comm Pip

Effective Date: 7/25/2022 Policy Term (Months): 10 Addnl Days to Cancel: 0

Carrier: MGA

MGA: G00020 APRIL CANADA INC., TORONTO

Lead Carrier: C00815 Lloyds of London, MONTREAL

Premium (incl. Taxes): Return Method: Short-Rate

Non-Refundable Fees (incl. Taxes): 0.00 Min. Retained Premium:

Refundable Fees (incl. Taxes): 0.00

Total Amount: 0.00

View Authorities Save Cancel

Step 6

- Click 'Edit' to make changes or
- Click 'Submit AP' if you are ready to submit or
- Click 'Close' to submit later*

Additional Premium Quote Entry - Jen's Flower Shop

Customer Information Policies Terms Summary Documents

Quote Variables

Province: British Columbia First Due Date: 8/25/2022: Maximum of 9 Installments

Billing Cycle: Monthly No. of Installments: 9

Payment Plan Option: 12 Equals - 45 day Down Payment %: 8.635 %

Down Payment (incl. Fees and any Past Dues): 172.70

Initial Payment Retained By Broker: Yes No

Reset to Defaults Clear Changes Recalculate

| General | Financials |
|---|---|
| Province: British Columbia | Flat Rate: 6.99 % |
| Payment Plan Option: 12 Equals - 45 day funding | Total Premium: 2,000.00 |
| Billing Cycle: Monthly | Down Payment %: 8.635 % |
| Rate Chart: N/A | Down Payment (incl. Fees and any Past Dues): 172.70 |
| First Due Date: 8/25/2022 | Amount Financed: 1,827.30 |
| | Finance Charge: 139.74 |
| | Total of Payments: 1,967.04 |
| | No. of Installments: 9 |
| | Installment Amount: 218.56 |
| | Total Installment Amount: 523.45 |

Edit Close Submit AP

*NOTE: If you simply click 'Close', your quote will not be submitted. You will be able to see it under the 'Quote Search' tab.

Once your quote is finalized and confirmed with the insured, please remember to come back and submit the quote.



Positive & Negative Endorsements

Step 7

If your endorsement was submitted, it will be marked with an 'X' under the 'Submitted' column. Otherwise, click on the quote you want to submit.

| Quote No + | Submitted | Name | Total Premium | Date Created | Submitted By |
|------------|-----------|-------------------|---------------|--------------|------------------|
| 1576222 | | Jen's Flower Shop | 2,000.00 | 7/25/2022 | Blue Chip Agency |
| 1575521 | X | Ana Smith | 400.00 | 7/25/2022 | Blue Chip Agency |
| 1573781 | X | Jen's Flower Shop | 500.00 | 7/25/2022 | Blue Chip Agency |
| 1573682 | X | Jen's Flower Shop | 1,000.00 | 7/25/2022 | Blue Chip Agency |
| 1573625 | | Jen Petford | 1,000.00 | 7/25/2022 | Blue Chip Agency |
| 1573492 | X | James Petters | 400.00 | 7/25/2022 | Blue Chip Agency |
| 1573484 | X | Jen Petford | 300.00 | 7/25/2022 | Blue Chip Agency |
| 1572718 | X | Sunshine Market | 2,000.00 | 7/25/2022 | Blue Chip Agency |
| 1567304 | | Jen's Flower Shop | 600.00 | 7/25/2022 | Blue Chip Agency |
| 1560416 | X | Jen's Flower Shop | 600.00 | 7/21/2022 | Blue Chip Agency |
| 1557487 | | JP Trucking Ltd | 600.00 | 7/20/2022 | Blue Chip Agency |

Step 8

Click the 'Terms' tab to submit. Review information and click 'Submit AP'.

Quote Variables

| | | | |
|----------------------|--------------------|--|---|
| Province: | British Columbia | First Due Date: | 8/25/2022: Maximum of 9 Installments |
| Billing Cycle: | Monthly | No. of Installments: | 9 |
| Payment Plan Option: | 12 Equals - 45 day | Down Payment %: | 8.635 % |
| | | Down Payment (incl. Fees and any Past Dues): | 172.70 |
| | | Initial Payment Retained By Broker: | <input type="radio"/> Yes <input checked="" type="radio"/> No |

Buttons: [Reset to Defaults](#) [Clear Changes](#) [Recalculate](#)

| General | | Financials | |
|----------------------|----------------------------|--|----------|
| Province: | British Columbia | Flat Rate: | 6.99 % |
| Payment Plan Option: | 12 Equals - 45 day funding | Total Premium: | 2,000.00 |
| Billing Cycle: | Monthly | Down Payment %: | 8.635 % |
| Rate Chart: | N/A | Down Payment (incl. Fees and any Past Dues): | 172.70 |
| First Due Date: | 8/25/2022 | Amount Financed: | 1827.30 |
| | | Finance Charge: | 139.74 |
| | | Total of Payments: | 1,967.04 |
| | | No. of Installments: | 9 |
| | | Installment Amount: | 218.56 |
| | | Total Installment Amount: | 529.45 |

Buttons: [Edit](#) [Close](#) [Submit AP](#)

That's it! Your quote is now submitted and assigned a Quote #.



Positive & Negative Endorsements

After the quote has been submitted, you can make changes to it up until the point it is processed by our team.

You can review the details in the tabs that appear. Both you and the insured will be sent a notice with a revised payment schedule.

Keep in mind:

- If there is only one payment left on the account, the PE will be taken as a single payment endorsement.
- A positive endorsement will not be processed if the account is in arrears.
- Past dues on PEs will be collected in the down payment.

Negative Endorsements

If Imperial PFS Canada has released the disbursement to the Brokerage, the Brokerage will transfer the funds to Imperial PFS Canada via EFT payment or via bill payment by adding us as a Payee (see instructions [here](#)).

The negative endorsement will be applied to the account as soon as we receive the payment.

If Imperial PFS Canada has not released the disbursement to the Brokerage, the Brokerage will email premiumfinance@ipfscanada.com requesting a negative endorsement. A revised payment schedule will be sent to the broker on file.

- In both cases, a revised payment schedule will be sent to the broker on file. The client copy will be either mailed or emailed to the client depending on how the account was set up.
- A negative endorsement will not be processed if the account is in arrears.
- Imperial PFS Canada cannot process a NE until the down payment clears the client's account.