

DOCUSIGN® BENEFITS

FIRST Insurance Funding leads the industry with a new process for electronic signatures!

FIRST's partnership with DocuSign® brings electronic signatures to premium finance. For the first time, the e-signature process has been seamlessly integrated into the Premium Finance Agreement (PFA) completion process.

HOW DOES IT WORK?

Agents and Brokers can transmit PFAs to their insureds for their electronic signature *directly* from Quotes-in-View (QIV), FIRST's quoting platform. Insureds may now sign PFAs from their computers, smart phones, or any touch device. On-the-go insureds simply need to have access to e-mail and the internet to complete agreements. Once the insured signs the PFA, it is automatically transmitted back to the Agent or Broker for their electronic signature. Electronically signed agreements may be accepted for processing on QIV through Qwik Loan or automatically booked once both parties sign the agreement. Fully executed PFAs are available in QIV for immediate, instant access.

BENEFITS:

- Go Green—no need to print agreements for signature or storage.
- Shortens the PFA lifecycle—Producers and Account Managers spend much less time following up on outstanding agreements.
- Ability to set reminders through QIV—if an insured does not complete the agreement by a specified date, the agency will receive an email notification that the PFA is still outstanding on that date.
- Easy retrieval of completed documents—all completed PFAs are available through QIV as well as DocuSign®, with the option to save executed agreements to a local computer. No more paper files!
- Reduction in E&O exposure—documents come back in good order and are easily retrievable.
- Reach clients anywhere, anytime, and on any device—insureds may conduct their business as it suits them.
- Allows for securely transmitted PFAs to clients (SAS70 Type II and ISO27001 compliant data centers).

Proudly Endorsed By:

