



gotoPremiumFinance.com

Insurance Premium Finance Solutions



Nationwide provider of insurance premium finance solutions

Products/Services Overview

21820 Burbank Blvd, Suite 300
Woodland Hills, CA 91367
888-875-4000
Fax: 818-610-2066
www.gotopremiumfinance.com

Overview

Since 2001, gotoPremiumFinance has raised the bar by which all premium finance providers are measured. Providing highly competitive rates and terms to brokers and their clients is only half the equation.

Innovative technology and unparalleled customer support is what truly separates our offering to the marketplace. Unlike the "cookie cutter" approach that most premium finance companies deploy with their agents, each and every broker doing business with gotoPremiumFinance is uniquely qualified. This helps insure delivery of value added products and services that impacts their particular business needs.

Please take the time to view the information located throughout this brochure and compare it to your current relationship. We believe you will find significant value in the products and services we bring to the table.

gotoPremiumFinance is a wholly owned subsidiary of Input 1, LLC. We are a nationwide provider of premium finance solutions based in Los Angeles, with a staff of 110 personnel and over \$400 million under management



Retail Agents / Brokers

Gain a competitive advantage by offering value added-services to your clients.

[Learn more >>](#)



ONLINE SERVICE CENTER

Use our powerful web-based applications to easily:

- Review Accounts
- Prepare Finance Agreements
- Submit Online Payments

[Click to Login >>](#)

[Retail Agents / Brokers](#) | [MGA's / Wholesalers](#) | [Insurance Carriers](#)

gotoPremiumFinance.com is a nationwide provider of insurance premium finance solutions.

We distinguish ourselves in our marketplace through outstanding customer service, superior technology and a progressive, solutions-oriented management team.

Our industry leading technology and value-added services help our clients accurately and efficiently secure the creative financing solutions they need.

LATEST NEWS

05/01/07 - New gotoPremiumFinance.com web site launches.

[View All News](#)

Solutions Literature

Industry Leading Solutions for your premium financing



Gain a competitive edge with "best-in-class" technology and creative revenue sharing programs.

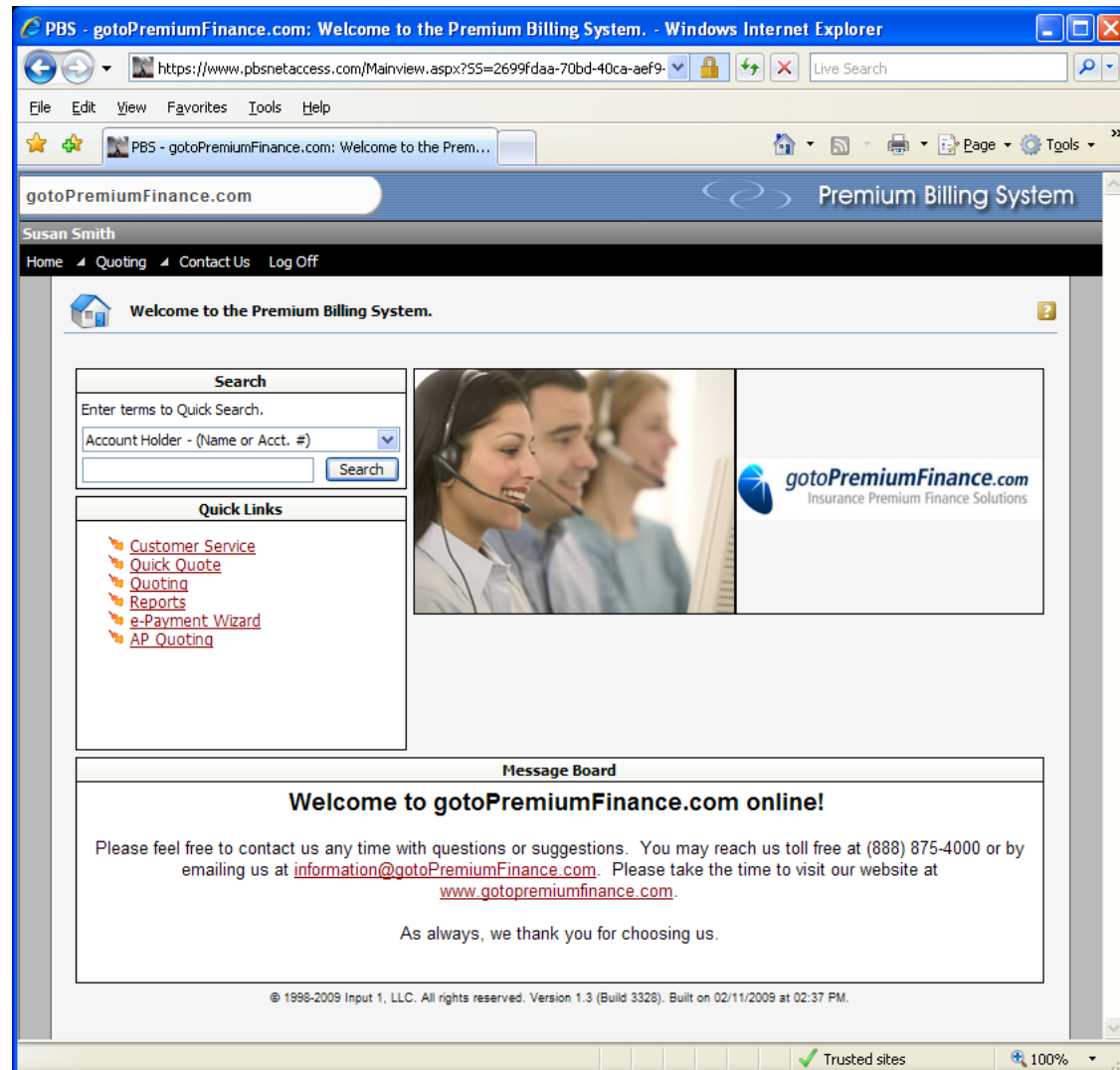
[View PDF 150kb](#)



Real Time Quoting, Real Time Account Access.....Real Time Results!

From our convenient home page, agents immediately have access to the following high level areas of the system:

- Account Search
- Quote Search
- Detailed Loan Information
- Quoting (Original loan)
- Quoting (Additional Premiums)
- Quick Quote
- Reporting
- E-Payments
- Missing Policy Numbers
- Manage Your Password



Online Quoting

Quote your customer a monthly payment amount over the web...NOW! With online quoting from gotoPremiumFinance.com you have the power to quote and print finance agreements right away!

Customer Information Policies Terms								
Policy #	Eff Date	Carrier	Cover	Premium	Ern Fees	Fin Fees	Total	
1	TBI	7/6/2008	ABC Insurance Company	LIAB	15,000.00	100.00	15.25	15,115.25

New Policy 15,115.25

Policy Details

Policy Number: TBI Coverage: LIAB **LIABILITY (NO TRUCKING)**

Effective Date: 7/6/2008 Policy Term (Months): 12

Carrier: ABC Insurance Company

Gen. Agent:

SL Brokers:

Code	Name
No SL brokers associated.	

Premium: 15,000.00 Return Method: Pro-F


Earned Taxes/Fees: 100.00 Min. Earned Premium: 0.0

Financed Taxes/Fees: 15.25 Policy Commission: 0.0

Total Amount: 15,115.25 Filing

View Authorities

< Back Next >

		Service Street Address: 21820 Burbank Blvd, Suite 300 Woodland Hills, CA 91367-6476 Phone: (888) 875-4000 Facsimile: (818) 598-2296		COMMERCIAL INSURANCE PREMIUM FINANCE AGREEMENT and DISCLOSURE STATEMENT		
Service Mailing Address: P.O. Box 4470 Woodland Hills, CA 91365-4470		www.gotopremiumfinance.com		<input checked="" type="checkbox"/> New <input type="checkbox"/> Renewal <input type="checkbox"/> Additional Premium		
BORROWER / INSURED Account # Richter Contractors 234 South Main Street Suite 200 Los Angeles, CA 12345 (213) 123-1234		AGENT / BROKER Agent # A00002 ABC Agency of the West 123 Main Street Los Angeles, CA 93001 (818) 676-2135				
SCHEDULE OF POLICIES						
Policy Number	Name of Insurance Company and General Agent (if any)	Effective Date	Type of Coverage	Policy Term	PREMIUM AMOUNT	
TBI	T00013-ABC Insurance Company [PR]	7/6/2008	LIAB	12	15,000.00	
				Ernd. Taxes/Fees	100.00	
				Fin. Taxes/Fees	15.25	
Quote Number: 190					TOTAL PREMIUM(S)	15,115.25
TOTAL PREMIUM(S)	DOWN PAYMENT	AMOUNT FINANCED <small>(amount of credit provided on your behalf)</small>	FINANCE CHARGE <small>(dollar amount the credit will cost you)</small>	FLORIDA DOCUMENTARY STAMP TAX <small>(only applicable in Florida)</small>	TOTAL OF PAYMENTS <small>(amount you will have paid after making all scheduled payments)</small>	A. P. R. <small>(cost of credit as a yearly rate)</small>
15,115.25	3,853.81	11,261.44	596.60	0.00	11,858.04	12.541%
In consideration of the premium payment(s) to be made by LENDER listed below, the Borrower promises to pay to the order of LENDER the TOTAL OF PAYMENTS in accordance with the PAYMENT SCHEDULE below and subject to the provisions set forth herein.						
PAYMENT SCHEDULE	First Installment Due Date	Amount of Each Installment	Installment Schedule			
	8/6/2008	1,317.56	Number of Payments	Payment Due Date		
			9	6th(Monthly)		
ACKNOWLEDGEMENT AND AGREEMENT BY BORROWER				AGENT / BROKER REPRESENTATIONS AND WARRANTIES		
Prepayment. The Insured may prepay the full amount due and receive a refund of the unearned				The policy premiums listed above are being		

First Payment Invoice/Coupon

Prevent costly cancellations. Print the first payment invoice or coupon for the insured along with the finance agreement.

Notices[1].pdf - Adobe Reader

File Edit View Document Tools Window Help

1 / 1 95% Find

gotoPremiumFinance.com
P.O. Box 4470
Woodland Hills, CA 91365-4470
Phone: (888) 875-4000 / Fax: (818) 598-2296

BILLING STATEMENT

Statement Date
7/6/2008

Account Number
1031-190

Richter Contractors
234 South Main Street
Suite 200
Los Angeles, CA 12345

Installment Due Date:	8/6/2008
Installment Amount:	1,317.56
Previous amounts due as a result of short payment, late and/or other fees (as of 7/6/2008):	0.00
Amount Due if we receive your payment on or before 8/6/2008:	1,317.56
Amount Due if we receive your payment after 8/6/2008 (includes a late charge of 65.88):	1,383.44

RETURN THIS PORTION WITH YOUR PAYMENT

BILLING STATEMENT (00000020)

gotoPremiumFinance.com
P.O. Box 4470
Woodland Hills, CA 91365-4470
Phone: (888) 875-4000 / Fax: (818) 598-2296
www.gotopremiumfinance.com

RETAIN THIS PORTION FOR YOUR RECORDS

Installment Due Date:	8/6/2008
Installment Amount:	1,317.56
Previous amounts due as a result of short payment, late and/or other fees (as of 7/6/2008):	0.00
Amount Due if we receive your payment on or before 8/6/2008:	1,317.56
Amount Due if we receive your payment after 8/6/2008 (includes a late charge of 65.88):	1,383.44

Agent/Broker: ABC Agency of the West

- If you mail your payment please allow 7-10 days mailing time to ensure timely application of your payment.
- For immediate credit to your account you may make your payment on the internet at the website shown above.
- Failure to pay past due amounts and your current installment may result in cancellation of your insurance.

RECENT ACCOUNT ACTIVITY

Activity Date	Description of Activity	New Charges/Credits	Account Balance
**** There is no recent activity on your account			

INSURANCE POLICIES RELATING TO THIS ACCOUNT

Eff. Date	Insurance Carrier	Type of Coverage	Premium
7/6/2008	ABC Insurance Company	LIAB	15,000.00

E-Submission

With one mouse click you can instantly submit finance agreements to our office for processing. No more faxes! No more mailing!

Customer Information | Policies | **Terms**

Quote Variables

Governing Region:	California	Equal Pay Quote:	<input type="checkbox"/>
First Due Date:	8/6/2008	Earned Broker Fee:	0.00
Billing Cycle:	Monthly	Financed Broker Fee:	0.00
Billing Method:	Coupon	Down Payment:	25.000 % 3,853.81
Disbursement Delay:	15 Days	No. of Installments:	9
Rate Chart:	GO 35	APR:	12.541 %
Agent Premium Fin. Referral Fee Plan:	1% AF Fee	Agent Premium Fin. Referral Fee:	112.61


General		Financials	
Governing Region:	California	Agent Premium Fin. Referral Fee:	112.61
First Due Date:	8/6/2008	APR:	12.541 %
Billing Cycle:	Monthly	Total Premium:	15,115.25
Billing Method:	Coupon	Down Payment:	25.000 % 3,853.81
Disbursement Delay:	15 Days	Amount Financed:	11,261.44
Rate Chart:	GO 35	Finance Charge:	596.60
Agent Premium Fin. Referral Fee Plan:	1% AF Fee	Total of Payments:	11,858.04
Equal Pay Quote:	No	No. of Installments:	9
Earned Broker Fee:	0.00	Installment Amount:	1,317.56
Financed Broker Fee:	0.00		

Windows Internet Explorer


By clicking "OK" below you are submitting this finance agreement to us for processing and acceptance. This is the equivalent to signing and sending us the finance agreement via the mail or fax.

Additional Premium Quoting.....Online!

Agents can quickly perform their own additional premium quoting online without having to phone for a quote!

 **Additional Premium Quote Entry - Tree Trimmer Inc**
?

Customer Information		Policies Terms	
Customer Information		Summary Financials	
Account Number:	9977	Total Premium:	5,000.00
Account Holder:	Tree Trimmer Inc	Down Payment: (25.000 %)	1,250.00
Main Address:	34 Western Avenue San Francisco, CA 92312	Amount Financed:	3,750.00
Main Phone:	(415) 123-4561	Non-Refundable Fee:	0.00
Agent:	A00026 - ATB Insurance Agency, LLC	Finance Charge:	231.51
Main Phone:	(714) 555-0405	Total of Payments:	3,981.51
		No. of Installments:	9
Received Date:	--	Next Intent Date:	8/20/2007
Creation Date:	7/10/2007	Scheduled Cancellation Date:	8/30/2007
Created By:	Chris Farfaras	Cancellation Hold Date:	--
Effective Date:	7/10/2007	Next Reinstatement Date:	--
Archive Date:	--	Next Late Fee Date:	8/20/2007
Balance Due Date:	--		
First Due Date:	8/10/2007	Last Intent Date:	--
Next Due Date:	8/10/2007	Last Cancellation Date:	--
Final Due Date:	4/10/2008	Last Reinstatement Date:	--


 **Additional Premium Quote Entry - 15347 - Tree Trimmer Inc**
?

Customer Information Policies		Terms	
Quote Variables			
Governing Region:	California	First Due Date:	9/10/2007: Maximum of 8 Installments
Billing Cycle:	Monthly	No. of Installments:	8
Quoting Configuration:	STD	Down Payment:	27.300 %
		APR:	14.591 %
<input type="button" value="Reset to Defaults"/> <input type="button" value="Clear Changes"/> <input type="button" value="Recalculate"/>			
General		Financials	
Governing Region:	California	APR:	14.591 %
Quoting Configuration:	STD	Total Premium:	2,500.00
Billing Cycle:	Monthly	Down Payment:	27.300 %
Rate Chart:	N/A	Amount Financed:	1,817.50
First Due Date:	9/10/2007	Finance Charge:	125.86
		Total of Payments:	1,943.36
		No. of Installments:	8
		Installment Amount:	242.92
		Total Installment Amount:	685.31

Agent Account Status

Agents have a variety of options once they've selected an account:

- View detailed account information (screen displayed to the right), including;
 - Customer information
 - Policy information
 - Loan terms
 - Loan disbursements
 - Payment activity
 - Documents
 - Account balance
- Make a check payment online
- Make a credit card payment online
- View payoff amount
- View and print all notices that were previously generated on their account
- Change their Password

 Customer Service - ABC-9977 - Tree Trimmer Inc
?

Account Number: ABC-9977
Account Name: Tree Trimmer Inc
Current / Active ●

Summary	Customer	Policies	Terms	Disbursements	Payments	Documents	Balance
Customer Information				Summary Financials			
Account Number:	9977	Total Premium:		5,000.00			
Account Holder:	Tree Trimmer Inc	Down Payment:		(25.000 %) 1,250.00			
Main Address:	34 Western Avenue San Francisco, CA 92312	Amount Financed:		3,750.00			
Main Phone:	(415) 123-4561	Non-Refundable Fee:		0.00			
Agent:	A00026 - ATB Insurance Agency, LLC	Finance Charge:		231.51			
Main Phone:	(714) 555-0405	Total of Payments:		3,981.51			
Received Date:	--	No. of Installments:		9			
Creation Date:	7/10/2007	Installment Amount:		442.39			
Created By:	Chris Farfaras	APR:		14.582 %			
Effective Date:	7/10/2007	Installments Made/Remaining:		0 / 9			
Archive Date:	--	Next Installment Amount:		442.39			
Balance Due Date:	--	Next Late Fee Amount:		22.12			
First Due Date:	8/10/2007	<u>Shortage:</u>		0.00			
Next Due Date:	8/10/2007	<u>Auto Assessed Late Fee Breakdown</u>					
Final Due Date:	4/10/2008	Account Balance (inc. fees):		3,981.51			
		Current Amount Due:		0.00			
		15-Day Payoff Calculator		\$ 3,775.00			

Audit Log
Pay Now
Account Options... ▼
Edit
Close

Insured Account Status

To save our agents time, we provide insureds access to our website and allow them to perform the following:

- View account summary information (screen displayed to the right)
- Make a check payment online
- Make a credit card payment online
- View complete payment history
- Update personal information (i.e. address, phone, etc.)
- Print their current invoice
- View and print all notices that were previously generated on their account
- Change their Password

Select an Option	
Account Summary	
Payment History	
Change Personal Info	
Change Password	
Make E-Payment	
Documents	

Account Summary

Account #:	ABC-9126
Name:	Rocklin Incorporated
Address:	7504 New Hope Drive Quail Valley, CA 99661
Agent:	Test Agent
Agent Phone:	(805) 555-6455
Account Status:	Cancelled
Installments Made:	2
Installments Remaining:	7
Next Payment Due On:	5/1/2007
Current Amount Due:	143.72
Intent to Cancel Date:	5/11/2007
Cancellation Effective Date:	5/21/2007 Pay Now
Account Balance:	329.16

[Print Current Invoice](#)

Message Board

To Our Valued Customers:

Please be aware that our offices will be closed on President's Day, February 16th, 2009.

Online Payment Options

Our convenient online payment service helps agents and insureds prevent costly cancellations and rewrites. Agents or insureds can either enter check or credit card information and submit the payment to us on-line.

The image displays two overlapping screenshots of the 'e-Payment Wizard' web application. The top screenshot shows the 'Welcome to the e-Payment Wizard' screen, and the bottom screenshot shows the 'Enter Credit Card Information' screen.

Top Screenshot: Welcome to the e-Payment Wizard

- Select an Option** (Left Navigation Menu):
 - Account Summary
 - Payment History
 - Change Personal Info
 - Change Password
 - Make E-Payment** (highlighted with a red oval)
 - Documents
- Welcome to the e-Payment Wizard** (Main Content):
 - This wizard will guide you through the process of making an online payment.
 - Payment Method** dropdown menu:
 - [Select an Item]
 - [Select an Item]
 - Check
 - Credit Card
 - Navigation: < Back, Next >

Bottom Screenshot: Enter Credit Card Information

Please provide the cardholder's name and address as it appears on the Credit Card Statement.

Scheduled Post Date: 7/11/2007

Name as it appears on Card: Rocklin Incorporated

Charge Amount: 143.72

Charge Fee: 0.00

Credit Card Type: [Select an Item]

Credit Card Number: [Text Field]

Expiration Date (MM/YY): [Text Field]

CCV Number: [Text Field]

Address: 7504 New Hope Drive

City: Quail Valley

Country: United States of America

Region / Postal: CA - California 99661

Navigation: < Back, Next >, Finish, Cancel

Cancellation Hold Feature

Our online cancellation hold feature helps agents avoid pending cancellations and costly rewrites without having to call us. Agents are given the option to put a specific account on hold for up to 5 calendar days via our website to prevent a cancellation from occurring.

Account Number: ABC-9977 Account Name: Tree Trimmer Inc Current / Active

Summary Customer Policies Terms Disbursements Payments Documents Balance

Customer Information		Summary Financials	
Account Number:	9977	Total Premium:	5,000.00
Account Holder:	Tree Trimmer Inc	Down Payment: (25.000 %)	1,250.00
Main Address:	34 Western Avenue San Francisco, CA 92312	Amount Financed:	3,750.00
Main Phone:	(415) 123-4561	Non-Refundable Fee:	0.00
Agent:	A00026 - ATB Insurance Agency, LLC	Finance Charge:	231.51
Main Phone:	(714) 555-0405	Total of Payments:	3,981.51
Received Date:	--	No. of Installments:	9
Creation Date:	7/10/2007	Installment Amount:	442.39
Created By:	Chris Farfaras	APR:	14.582 %
Effective Date:	7/10/2007	Installments Made/Remaining:	0 / 9
Archive Date:	--	Next Installment Amount:	442.39
Balance Due Date:	--	Next Late Fee Amount:	22.12
First Due Date:	8/10/2007	Next Reinstatement Date:	--
Next Due Date:	8/10/2007	Next Late Fee Date:	8/20/2007
Final Due Date:	4/10/2008	Last Intent Date:	--
		Last Cancellation Date:	--
		Last Reinstatement Date:	--
		Account Balance (incl. fees):	3,981.51
		Current Amount Due:	0.00
		15-Day Payoff Calculator:	\$ 3,775.00

Audit Log Pay Now Save Cancel

Cancellation Hold Setup -- Webpage Dialog

Cancellation Hold	
Account Number:	9977
Insured Name:	Tree Trimmer Inc
Next Due Date:	8/10/2007
Next Intent Date:	8/20/2007
Next Cancel Date:	8/30/2007
Current Amount Due:	0.00
New Cancellation Hold Date:	9/2/2008

Remove Hold Save Cancel

24/7 Access to Notices/Letters

Misplaced coupons or payment invoice? Looking for a particular notice on an account placed by your agency, i.e. intent, cancellation or reinstatement? Our document imaging folder automatically stores all notices and letters in a tab for each account and allows agents and insureds to retrieve and print them whenever they want.

ABC Premium Finance Company 7/12/2007 Premium Billing System

Chris Farfaras

Home Accounts Quotes Payments Parties Disbursement Printing Management Admin Portfolio Log Off

Customer Service - ABC-9977 - Tree Trimmer Inc

Account Number: ABC-9977
Account Name: Tree Trimmer Inc
Current / Active

Summary
Customer
Policies
Terms
Disbursements
Payments
Memos
Ledger
Documents
Balance

Title	Method	Creator	Date Created	Pages
ACH Authorization	Manual	Chris Farfaras	7/12/2007	1
Notice of Financed Premium	Day End	System	7/10/2007	1
Notice of Financed Premium	Day End			
Notice of Acceptance	Day End			
Payment Coupons	Day End			
Payment Coupons	Day End			

6 Items

Generate Notice:

Pending Re-generations:

Notice

No notice has been scheduled to re-

Audit Log
Pay Now
Account

ACCOUNT NUMBER

ABC - 9977

Refer to this number on all correspondence

NOTICE OF ACCEPTANCE

SUBJECT TO VERIFICATION BY INSURANCE COMPANY (IES)

PO Box 4312
Woodland Hills, CA 91367
Phone: 800-229-9822

<http://www.abc-premiumfinance.com>
Check your account online: Your username is "ABC-9977". Your password is "g44960V" unless you have changed it.

NOTICE DATE

7/10/2007

Borrower	(00011868)	Agent or Broker
Tree Trimmer Inc 34 Western Avenue San Francisco, CA 92312		ATB Insurance Agency, LLC 5748 Golden Star Street Gateway Plaza, Suite 200 Danville, CA 31050

CONTRACT INFORMATION

A	B	C	D	E	F
Total Premium	Down Payment	Amount Financed (A minus B)	Finance Charge	Total of Payments (C plus D)	Annual Percentage Rate
5,000.00	1,250.00	3,750.00	231.51	3,981.51	14.582
		The Amount of Credit to be Paid	The Amount the Credit will Cost	The Total Amount to be Paid	Cost of the Credit as a Yearly Rate

PAYMENT SCHEDULE (Monthly)

Convenient Funding

Funding is available via Automated Clearing House (ACH) or by check. If your agency is set-up for ACH funding, you will automatically receive an email or fax (your choice) detailing all accounts that were funded for a specific date.

Disbursement_Report[1].pdf - Adobe Reader

File Edit View Document Tools Window Help

1 / 1 100% Find

Disbursement Report

Filter(s): 10/12/2006 to 7/12/2007
Disb. Method(s): ACH

Option(s): Grouped by Date Paid; Sorted by Serial Number

Friday, February 27, 2009 2:11 PM

Account Number	Insured Name	Agent	Company	Policy No.	Payee	Disb. Type	Disb. Method	Paid Date	Current Status	Serial Number	Amount
Date: 2/1/2007											
ABC-9118	Johnson Landscaping	Allesea's Co. - A00175	Dept and Associates - C00001	BOP10465702	Test Agent - A00065	Original	ACH	2/1/2007	Paid	2	375.00
ABC-9035	Lerry Jackson Hotels	Altima & Co. DBA Goergie & Associates Incorporated - A00139	Group Constitution Co. - C00123	TBI	Altima & Co. DBA Goergie & Associates Incorporated - A00139	Original	ACH	2/1/2007	Paid	3	10,000.00
Count: 2											10,375.00
Date: 3/21/2007											
ABC-9464	ABC Co	Allesea's Co. - A00175	Admiral Amwins Dunfield Company - C00017	tbd	Admiral Amwins Dunfield Company - C00017	Original	ACH	3/21/2007	Paid	4	1,050.00
ABC-9480	ABC	Allesea's Co. - A00175	Alea Western - C00128	yyyy	Alea Western - C00128	Original	ACH	3/21/2007	Paid	5	750.00
ABC-9472	Test Franklin 2	Altima & Co. DBA Goergie & Associates Incorporated - A00139	Admiral California - C00243	tbd	Admiral California - C00243	Original	ACH	3/21/2007	Paid	6	1,442.00
Count: 3											3,242.00
Date: 6/21/2007											
ABC-9686	testi	Duncun & Stoker - A00001	Dept and Associates - C00001	tbi	Duncun & Stoker - A00001	Original	ACH	6/21/2007	Paid	9	2,452.40
Count: 1											2,452.40
Date: 6/28/2007											
ABC-9902	Reghan Miller	Valley Steve - A00497	Alea Western - C00128	Tdp2124	Alea Western - C00128	Original	ACH	6/28/2007	Paid	10	3,000.00
Count: 1											3,000.00
Report Totals											
Count: 7											19,069.40

11.00 x 8.50 in

New Account Confirmation

We understand the importance of providing you pertinent and valuable information that you can use in your day-to-day business. One of the unique services we provide to all of our clients is a New Account Confirmation Report that is either faxed or emailed (your choice) to you, each and every time we accept a loan. This service allows you to review all of those accounts sent into us for processing.

New Business Confirmation Report

gotoPremiumFinance.com
Insurance Premium Finance Solutions

For the period: 3/12/2007 - 7/12/2007
Submitted by: ATB Insurance Agency, LLC-A00026

Friday, February 27, 2009 2:19 PM

Dear ATB Insurance Agency, LLC,

THANK YOU FOR YOUR BUSINESS!

Below, please find a list of new accounts we booked today on your behalf. You can get account status over the internet via our website at:

www.gotopremiumfinance.com

Your user name is **A00026**. If you forgot your password or never received one, please contact us by e-mail or by calling 800-229-9822 and we will be happy to assist you in gaining access to your accounts via the web. Your insureds may also access their account information via the web. A username and password is provided to each of the insureds when their loan is accepted.

We know that you have a choice in financing and we would like to take this opportunity to thank you for your business. Please be assured that we will do everything we can to meet your expectations and those of your insureds.

Please contact us at any time with your questions.

Account Num.	Insured Name	Date Booked	Total Premium	Down Payment	Amount Financed	Num. of Payments	Due Date	Payment Amount
ABC-9779	Johnson Delivery	5/23/2007	15,000.00	3,750.00	11,250.00	9	6/23/2007	1,204.05
ABC-9829	Johnson Delivery	6/13/2007	15,000.00	3,750.00	11,250.00	9	6/23/2007	1,342.94
ABC-9894	test	6/21/2007	55,273.44	19,138.44	36,135.00	8	8/18/2007	4,773.12
ABC-9977	Tree Trimmer Inc	7/10/2007	5,000.00	1,250.00	3,750.00	9	8/10/2007	442.39

Total New Accounts Booked for ATB Insurance Agency, LLC: 4

Seamless Integrations

We've made Premium Financing easy with our integrated approach to premium financing. We have built a convenient and easy to use quoting system that brings important quote information over from your agency management system to our online quoting application with no duplicate data entry required by your staff. Our application is currently integrated with a variety of agency management and rating systems. Please contact your local sales representative for more information on the systems with which we integrate with.

Your Agency Management System

Our Online Quoting System produces a PFA with no keystrokes required by your staff

33178 A-Tec-Electric, Inc.

Main Mtkg Doc's Quotes Billing Claims Misc Notes Other

Evanston NEW QUOTE Search F2

Quoted 11/1/05 Templ Evanston (M)

Carrier Evanston Insurance Company

Coverage Commercial General Liability - CG 0001 (07/98)

Limits-CGL \$1,000,000 Each Occurrence
\$2,000,000 General Aggregate
\$1,000,000 Products-Completed Operations Aggregate
\$1,000,000 Personal Injury and Advertising Injury
\$ 50,000 Fire Damage Liability (any one fire)
\$ 1,000 Medical Payments (per person)

Ded-CGL \$1,000
Applies Per Claim (applies to BI/PD/PI &AI) including Loss Adjustment Expense.

Forms-CGL **MANDATORY FORMS:**
 CG0001 (07/98) "Commercial General Liability Coverage Form";
 MSU 001 (06/04) "Combination General Endorsement" (Excludes: 1. Action over as well as bodily injury to any worker while working for the insured members or associates of the insured; absolute exclusion for aircraft, auto's or watercraft. 2. EPLI. 3. Total Pollution. 4. Asbestos, lead, silica dust, mold, growth, organic pathogen or mildew.; 5. Punitive Damages or fines. 6. Discrimination. 7. Acts of independent contractors or subcontractors unless certain like coverage and limits and showing named insured as an add'l insured if insured is a contractor, builder or developer. 8. Breach of Contract. 9. Subside movement. 10. Professional Liability. 11. Cross Suit between insureds; 12. Attorney costs under Supplementary Payments unless compensatory award by this policy and any such costs then reduce the limits of liability. 13. Duty to defend if there is no coverage provided by the terms of this policy).
 M/E-048 "Deductible Endorsement";
 IntellProp (09/01) "Intellectual Property Hazard Exclusion Endorsement" (excludes a. infringement of a patent, trademark, service mark, trade dress, slogan, or copyright joint ownership. b. disparagement of a person's or organization's goods, products, services or claims. c. unfair competition. d. trade libel. e. violation of the right of privacy or publicity. advertising ideas, style of doing business, intellectual property, trade secrets, market share agreements. f. violation relating to the Lanham Act, or g. violations of or claims relating to the Computer Fraud Act) (this form is not to be attached if P/AI is excluded);
 CG2169 (01/02) "War or Terrorism Exclusion"; CG0067 Exclusion ~ Violation of statutes that govern e-mails, fax, phone calls, or other methods of information.

Premium 6,702.00 Min E/P % 25.00 Tot Comm 20.00
 Co Fee State Tax 204.81 Ag Comm 10.00
 Broker Fee 150.00 Stamp Fee 15.36
 Br Insp Fee 125.00 Tax State CA

Valid days 30 Firm Remarks

Notices[1].pdf - Adobe Reader

gotoPremiumFinance.com
Insurance Premium Finance Solutions

21820 Burbank Blvd, Suite 200
Woodland Hills, CA 91367-6476
Phone: (888) 875-4000
Facsimile: (818) 598-2296
www.gotopremiumfinance.com

Service Mailing Address:
P.O. Box 4470
Woodland Hills, CA 91365-4470

and DISCLOSURE STATEMENT

New Renewal Additional Premium

AGENT / BROKER Agent #: A00002
ABC Agency of the West
123 Main Street
Los Angeles, CA 93001
(818) 676-2135

BORROWER / INSURED Account #:
Richter Contractors
234 South Main Street
Suite 200
Los Angeles, CA 12345
(213) 123-1234

Policy Number	Name of Insurance Company and General Agent (if any)	Effective Date	Type of Coverage	Policy Term	PREMIUM AMOUNT
TBI	T00013-ABC Insurance Company [PR]	7/6/2008	LIAB	12	15,000.00
				Emd. Taxes/Fees	100.00
				Fin. Taxes/Fees	15.25

Quote Number: 190 **TOTAL PREMIUM(\$)** 15,115.25

TOTAL PREMIUM(\$)	DOWN PAYMENT	AMOUNT FINANCED (amount of credit provided on your behalf)	FINANCE CHARGE (dollar amount the credit will cost you)	FLORIDA DOCUMENTARY STAMP TAX (only applicable in Florida)	TOTAL OF PAYMENTS (amount you will have paid after making all scheduled payments)	A. P. R. (cost of credit as a yearly rate)
15,115.25	3,853.81	11,261.44	508.04	0.00	11,769.48	10.701 %

In consideration of the premium payment(s) to be made by LENDER listed below, the Borrower promises to pay to the order of LENDER the TOTAL OF PAYMENTS in accordance with the PAYMENT SCHEDULE below and subject to the provisions set forth herein.

PAYMENT SCHEDULE	First Installment Due Date	Amount of Each Installment	Installment Schedule	
			Number of Payments	Payment Due Date
	8/8/2008	1,307.72	9	6th(Monthly)

ACKNOWLEDGEMENT AND AGREEMENT BY BORROWER
Prepayment. The Insured may prepay the full amount due and receive a refund of the unearned interest as provided on page 2 of this agreement.

AGENT / BROKER REPRESENTATIONS AND WARRANTIES
The policy premiums listed above are being financed by First Insurance Funding Corp. of

Revenue Participation for Agents

Agent fee programs are available to those agents that write business in rebating states. We pay agents their fees on a monthly basis.¹

Fee Options Available

- **Spread Based Fee**, i.e. you mark the rate up and keep the difference between our rate and the rate you charge your customer
- **% of Amount Financed**, i.e. 1% of the Amount Financed
- **% of Amount Financed with minimum fee**, i.e. 1% of the Amount Financed with a minimum \$25.00 per loan fee
- **Basis Points per loan**, i.e. 100 basis points

Referral Fee Report

Filter(s): Date Paid from 12/09/2006 to 03/09/2007

Option(s): Sorted by Date Paid

Friday, March 09, 2007 9:40 AM

Account Number	Insured Name	Entity Code	Entity Name	Date Calculated	Date Paid	Date Disbursed	Amount of Fee	Referral Fee Type	Event/User Reason
65466	K9 Search On Site	A00010	Allico Barette Carquinez	2/2/2007	2/21/2007	--	50.00	Agent	
65698	Community Broadcasting Services Inc	A00120	Jones Lords	2/2/2007	2/21/2007	--	153.16	Agent	
67405	Steve Beal	A00080	Mfc & V Mejia & Co.	2/7/2007	2/21/2007	--	396.40	Agent	
68296	Halerok Constructors Llc	A00010	Allico Barette Carquinez	2/7/2007	2/21/2007	--	50.00	Agent	
68445	Venturetech Inc	A00010	Allico Barette Carquinez	2/7/2007	2/21/2007	--	50.00	Agent	
68817	Prosperity Title Pllc	A00010	Allico Barette Carquinez	2/7/2007	2/21/2007	--	50.00	Agent	
69369	Safe Entry Housing	A00080	Mfc & V Mejia & Co.	2/7/2007	2/21/2007	--	406.23	Agent	
69500	Strobel Oil Inc	A00010	Allico Barette Carquinez	2/7/2007	2/21/2007	--	50.00	Agent	
69740	K9 Search On Site	A00010	Allico Barette Carquinez	2/7/2007	2/21/2007	--	50.00	Agent	
69799	Midsouth Medical Imaging Llc	A00126	Mesa Guys	2/7/2007	2/21/2007	--	439.60	Agent	
69849	Silverados East	A00080	Mfc & V Mejia & Co.	2/7/2007	2/21/2007	--	500.00	Agent	
69989	Community Broadcasting Services Inc	A00120	Jones Lords	2/7/2007	2/21/2007	--	153.16	Agent	
70078	Pat Warehouse	A00010	Allico Barette Carquinez	2/9/2007	2/21/2007	--	50.00	Agent	
70128	Hercules Fiber II, Llc	A00005	John Corp.	2/21/2007	2/21/2007	--	200.00	Agent	
70136	Jackson Sales, Inc	A00005	John Corp.	2/21/2007	2/21/2007	--	77.63	Agent	
70144	Mr Testing	A00014	Advocate Delaney Mitchell	2/21/2007	2/21/2007	--	17.50	Agent	

¹ Branding, revenue sharing, incentives, and fees are not allowed and will not be offered in fee prohibited states.

Scheduled Reporting for Agents

We automatically deliver you customized reporting when you want and where you want it delivered. This saves agents time from having to manually run the reports they need from the finance company. Specific reports like new business, pending cancellations or disbursements can be waiting for you in your in-box each morning.

📁 Reports

- 📄 Cancellation Hold Report
- 📄 Cancelled and Reinstated Report
- 📄 Disbursement Report
- 📄 Epayment Report
- 📄 Missing Policy Report
- 📄 New Account Report
- 📄 New Business Confirmation Report
- 📄 Pending Cancellation Report
- 📄 Quote Report

Pending Cancellation Report

Next scheduled to run on Monday, July 07, 2008.

Schedule

Schedule	Next Run	Requested By
Run on Monday every week.	7/7/2008	Chris Farfaras ✕

Schedule to Run: Day of Week:

Deliver Using: E-mail Address:

Report Format:

Pending_Cancellation_Report[1].pdf - Adobe Reader

File Edit View Document Tools Window Help

Pending Cancellation Report

Filter(s): Scheduled Cancellations from 7/13/2007 to 7/22/2007

Option(s): Sorted by Cancellation Date Friday, February 27, 2009 2:43 PM

Account Number	Insured Name	Agent	Installments Made	Next Due Date	Scheduled Cancellation Date	Cancellation Hold Date	Amount Due	Customer Telephone Number
ABC-9761	abc plumbing	Foster Agency - A00002	0	6/23/2007	7/13/2007	--	13,497.80	(330) 722-3000
ABC-9779	Johnson Delivery	ATB Insurance Agency, LLC - A00026	0	6/23/2007	7/13/2007	--	1,264.25	
ABC-9803	abc plumbing	Altma & Co. DBA Goergie & Associates Incorporated - A00139	1	6/23/2007	7/13/2007	--	6,493.70	(330) 722-3000
ABC-9597	Trucking, Inc	Family Services Insurance - A00449	2	6/23/2007	7/13/2007	--	1,399.64	
ABC-9829	Johnson Delivery	ATB Insurance Agency, LLC - A00026	0	6/23/2007	7/13/2007	--	1,158.70	
ABC-9811	ACME Anvil Company	Todd's Test Agency - A00542	1	6/26/2007	7/16/2007	--	4,565.88	
ABC-9589	Minnie Walker	Specialists Elliot - A00003	2	6/27/2007	7/17/2007	--	465.30	
ABC-9951	Riverside Corporation	Alvarado Access - A00009	0	7/24/2005	7/20/2007	--	12,364.78	(800) 555-3113
ABC-9837	Test	Allesea's Randall Services - A00419	0	7/1/2007	7/21/2007	--	1,000.18	
ABC-9753	Pat Insured	Abaione Badi Bb & V & Co. - A00204	0	7/1/2007	7/21/2007	--	465.92	
ABC-9050	Test Account	Duncun & Stoker - A00001	0	7/1/2007	7/21/2007	--	456.00	
ABC-9068	Test Account 2	Duncun & Stoker - A00001	0	7/1/2007	7/21/2007	--	441.00	
ABC-9092	Test Account	Duncun & Stoker - A00001	0	7/1/2007	7/21/2007	--	441.00	
ABC-9100	Test Account	Duncun & Stoker - A00001	0	7/1/2007	7/21/2007	--	71.00	
Report Totals								
Count: 14								44,084.95

“Branding” Private Label Financing

Have you ever heard of “branding”? It’s the option of putting your name on the products and services you sell. ¹

Here’s how it works:

- a. You choose a brand name for your financing
- b. We typeset the finance agreements into the quoting site or software so you can utilize this new finance company name.
- c. Your customers see your “brand name” on all of the documents they receive.

PAYMENT INVOICE

ACCOUNT NUMBER	NOTICE DATE
ABC - 8631	5/19/2006
Refer to this number on all correspondence	DUE DATE
	5/24/2006

Borrower (00001838) **Agent or Broker**

Long Global
3967 Manchester Road
Atwood, CA 65775

Abalone Insurance
4039 Alicante Dr
Long Beach, CA 84345

The next installment on your account with us is coming due. To keep your account in good standing, please refer to the following chart below and make your payment by the date indicated.

The total number of installments on your account is	9
The installment number that is currently due is	1
There is a shortage on your account due to late charges, other fees and/or shortages in the amount of:	0.00
The amount of this installment with a due date of 5/24/2006 is:	964.10
The late charge that will be assessed to your account if this installment is late (received in our office after 6/3/2006)	48.20

Summary

The amount due if we receive your payment on or before 5/24/2006 is:	964.10
The amount due if we receive your payment after 6/3/2006 is:	1,012.30

RETAIN THIS PORTION FOR YOUR RECORDS

REMIT THIS PORTION WITH YOUR PAYMENT

MAKE CHECKS PAYABLE TO:	
PAYMENT COUPON	ABC Premium Finance PO Box 4312 Woodland Hills, CA 91367

Date of Notice	5/19/2006
Account Number	ABC - 8631
Installment Number	1
Amount due if we receive your payment on or before 5/24/2006	964.10
Amount due if we receive your payment after 6/3/2006	1,012.30

Insured:
Long Global

Note Purchase Option

If your business is located in a non-rebating state this concept can be extremely beneficial to you. First, we help you get licensed in those states you wish to do business in. We then set-up you up internally here with your own premium finance company. You originate your loans, but then sell these contracts to gotoPremiumFinance.com so there's no capital or risk required from your company.

Here's how it works:

gotoPremiumFinance.com will help you obtain a premium finance license for each of the states you write business in. Depending on each state, this can take anywhere from 60 – 180 days to complete. The premium finance licensing fees also vary by state depending on the level of difficulty. If you already possess a premium finance license the only step that's needed is for you to sign over your agreements to gotoPremiumFinance.com. Now you will be able to legally receive revenue sharing on each contract you write through your agency. No further work or effort is required on the part of your agency. Now you can sit back and enjoy the benefits of increasing your company's bottom line.

Review

<i>Feature</i>	<i>Advantage</i>	<i>Benefit</i>
<i>Online Finance Agreement Submission</i>	Electronically submit finance agreements with a click of the mouse.	No need to fax or mail finance agreements for processing.
<i>Online Quoting</i>	Quote and print finance agreements and a first payment coupon online. A convenient quick quote feature is also available.	All quoting is done via our website requiring only two screens of information to get a quote
<i>Online Additional Premium Quoting</i>	Additional premium quoting can be performed instantly by your agency online.	No phone calls are required!
<i>Internet Account Viewing</i>	Detailed account information is available to both you and your insured 24/7 online.	Detailed account information is available to both you and your insured 24/7 online.
<i>ACH Billing for Insureds</i>	Insureds can receive a coupon book, monthly bill or opt to have a payment withdrawn from their checking account via ACH.	Helpful to those accounts that wish to automatically have payments withdrawn from their bank account each month.
<i>Printing of the Insured's Next Bill</i>	Once the account is financed, you or the insured can easily print an online copy of the next installment invoice.	Provides immediate convenience to the insured and eliminates the need for a phone call.
<i>Pre-Cancellation Holds via the Web</i>	Agents can place a cancellation hold on a specific account (up to 5 days) online.	This feature saves the agency time by eliminating the need for a phone call to our office. This option also helps eliminate costly cancellations and rewrites.
<i>Check and Credit Card Web Payments</i>	A convenient payment option for you or the insured to us online.	This option helps eliminate costly cancellations and rewrites.
<i>Notice Delivery via Email</i>	A variety of account notices/letters can be emailed to one or more people within your agency.	Certain agency staff members receive the notices they need in electronic format, thus saving filing time for the agency.
<i>Seamless integration with your agency management system</i>	We currently integrate our online quoting application with a number of leading agency management and rating systems.	Our integration feature prevents duplicate data entry when premium financing is required. Typically the finance transaction can be completed with just a click of the mouse!
<i>Scheduled Reporting</i>	Customized reports can be automatically delivered to an email address of your choice each and every day.	Eliminates the time wasted in running reports each day, week or month.

Contact Information

P.O. Box 4470
Woodland Hills, CA 91365-4470
Phone: (888) 875-4000
Fax: (818) 610-2066

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