

The Agency **ADVANTAGE**

Increase your revenue and improve customer value with gotoPremiumFinance.

TABLE OF CONTENTS

3	Company Overview	11	Online Payment Options
4	gotoFact Sheet	12	SMS Text/E-mail Alerts
5	E-Submission & Online Quoting	13	Cross-Marketing
6	First Payment Coupon	14	Revenue Participation Plan
7	Additional Premium Quoting	15	Scheduled Reporting
8	Cancellation Hold	16	Features
9	Account Status		
10	Policyholder Accounts Status		

Five Star History with Nationwide Experience

Company

gotoPremiumFinance.com is an intelligent, dynamic and energetic financial services organization. We operate independently as a nationwide provider of premium financing services.

Commitment

gotoPremiumFinance.com and its parent company, Input 1, LLC, have been servicing the insurance community for over 30 years, earning a solid reputation by providing clients with the highest quality of services and products. From the very beginning, we have dedicated ourselves to accommodating the growing needs of our clients, and we look forward to providing that same level of excellence to you!

Leadership

Our executive and management team consists of individuals with 20 to 30 years of successful career experience in the top tier premium finance, insurance and banking industries.

Vision

To provide superior technology and outstanding customer service that consistently exceeds the expectations of our clients.

We've considered every detail in defining and delivering all of the services our clients need to make a premium finance transaction as easy as possible.

History

We've enjoyed tremendous growth since our inception in 2001 and currently we've created over 90 jobs for brilliant industry professionals in Westlake Village, California. A significant amount of credit is owed to our clients who share their personal stories and dreams with us. These inspiring individuals fuel our goals and aspirations as a financial services providers.

gotoPremiumFinance is a wholly-owned subsidiary of Input 1, LLC, and is the retail lending division of Input 1, LLC, which is a third party administrator (TPA), software developer and specialty consultant dedicated to the insurance premium financing space.

Input 1 currently services more than 175,000 premium finance loans per year and provides online account access to over 1 million policyholders and brokers. They also provide outsourced installment billing services to insurance carriers and general agencies throughout the United States. Additionally, they're the largest premium finance and auto warranty finance software provider in the United States.

Outsourcing, consulting and software systems are used by 3 of the largest insurance premium finance companies in the United States, including:

- **AFCO** (a subsidiary of Truist Financial Corp., TFC:NYSE)
- **First Insurance Funding Corp.** (a subsidiary of Wintrust Financial Corp., NASDAQ:WTFC)
- **IPFS** (Imperial PFS)

In addition to the top-tier premium financiers, Input 1 services more than 125 regional premium financing companies throughout the U.S., Canada and the Virgin Islands.

Since 1990, Input 1, LLC has been chosen as the back-up servicer for premium finance receivables ranging from \$50 million to \$5 billion, funded by the following entities:

- JP Morgan Chase Bank
- Wells Fargo Bank
- ING Capital
- GE Capital
- DZ Bank (5th largest bank in Germany)

[Home](#)
[Quoting](#)
[Contact Us](#)

Quote Entry - 270892 - John Smith

[Customer Information](#)
[Policies](#)
[Terms](#)
[Summary](#)
[Documents](#)
[Payments](#)

Quote Variables

Governing Region:	California	Equal Pay Quote:	<input type="checkbox"/>
First Due Date:	2/28/2020	Earned Broker Fee:	0.00
Billing Cycle:	Monthly	Financed Broker Fee:	0.00
Billing Method:	Invoice	Down Payment:	25.000 % 1,561.31
Rate Chart:	GO 106 Rates	No. of Installments:	10
Agent Premium Fin. Referral Fee Plan:	Spread	APR:	8.543 %
		Agent Premium Fin. Referral Fee:	0.00

[Edit Installment Schedule](#)
[Reset to Defaults](#)
[Clear Changes](#)
[Recalculate](#)

General		Financials	
Governing Region:	California	Agent Premium Fin. Referral Fee:	0.00
First Due Date:	2/28/2020	APR:	
Billing Cycle:	Monthly	Total Premium:	
Disbursement Delay:	Not Set	Down Payment:	
Rate Chart:	GO 106 Rates	Amount Financed:	
Agent Premium Fin. Referral Fee Plan:	Spread	Finance Charge:	
Equal Pay Quote:	No	Total of Payments:	
Earned Broker Fee:	0.00	No. of Installments:	
Financed Broker Fee:	0.00	Installment Amount:	440.00

[View/Print Documents](#)
[Digitally Sign](#)
[Edit](#)
[Close](#)

Instantly Submit Premium Finance Agreements!

You can submit any loan digitally. No fax or e-mail required!

Quote Your Customer a Monthly Payment Amount Online Instantly!

With Online quoting from gotoPremiumFinance.com, you have the power to quote and print or fax finance agreements at the point of sale!

Confirmation

By clicking the "OK" button below, you are submitting the following application for financing to us and you certify that you have been authorized by the customer to submit this agreement on their behalf:


Quote Number:	270892
Customer:	John Smith
Amount Financed:	4,233.92
No of Installments:	10
First Due Date:	2/28/2020
Installment Amount:	440.00

[OK](#)
[Cancel](#)

First Payment Coupon

Prevent Costly Cancellations

Over 25% of all cancellations occur because the accountholder either never receives or misplaces the first notice. Now you can print the first payment notice and deliver it directly to your customers at point-of-sale.



P.O. Box 4312
Woodland Hills, CA 91365

FIRST PAYMENT COUPON

Quote # 270165
12/17/2019 3:45:04 PM

John Smith
45641 Main St.
Woodland Hills, CA 91367

To our Customer:

Thank you for selecting gotoPremiumFinance.com for your premium finance needs. For your convenience, we are providing you with a coupon for your first installment.

You will be receiving payment coupons from gotoPremiumFinance.com- STAGING shortly, if you do not receive them please use this coupon to make your first installment. Please be aware that your first installment is still **due on 12/17/2017** and will be considered late if not received in our office by 12/27/2017 even if you do not receive your coupons in the mail.

If you do not receive your coupons in the mail within 5-10 days, please contact us at (888) 875-4000.

Please note:

- If you mail your payment please allow 7-10 days mailing time to ensure timely application of your payment.
- Failure to pay past due amounts and your current installment may result in cancellation of your insurance.

Please Return the Coupon below with your Payment

Payment Coupon (00150037)

MAKE CHECKS PAYABLE TO:
gotoPremiumFinance.com
P.O. Box 4312
Woodland Hills, CA 91365

INSURED: John Smith

45641 Main St.
Woodland Hills, CA 91367

Quote #	PAYMENT #	PAYMENT #
270165	1	1
IF PAYMENT IS RECEIVED BY	REGULAR PAYMENT AMOUNT	CHECK #
12/17/2017	389.84	
IF PAYMENT IS RECEIVED AFTER	LATE PAYMENT AMOUNT	DATE PAID
12/27/2017	409.33	
<input type="checkbox"/> Have you moved? Please check this box and print your new address on the back.	AMOUNT PAID	AMOUNT PAID

931-0270165XXXX00000389840000040933

Quote Additional Premiums Online

No more phone calls to the finance company for an additional premium quote. Simply choose the account, enter the additional premium figures and submit it for processing.

[Home](#)
[Quoting](#)
[Contact Us](#)

Additional Premium Quote Entry - Steve Ross

[Customer Information](#)
[Policies](#)
[Terms](#)

Quote Variables

Governing Region:	California	First Due Date:	3/23/2021: Maximum of 10 Installments ▼	
Billing Cycle:	Monthly	No. of Installments:	10	
Quoting Configuration:	GND15 ▼	Down Payment:	20.000 %	500.00
		APR:	8.545 %	

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

General		Financials	
Governing Region:	California	APR:	8.545 %
Quoting Configuration:	GND15	Total Premium:	2,500.00
Billing Cycle:	Monthly	Down Payment:	20.000 % 500.00
Rate Chart:	N/A	Amount Financed:	2,000.00
First Due Date:	3/23/2021	Finance Charge:	73.80
		Total of Payments:	2,073.80
		No. of Installments:	10
		Installment Amount:	207.38
		Total Installment Amount:	377.87

[< Back](#)
[Next >](#)
[Digitally Sign](#)
[Save](#)
[Reset](#)

Cancellation Hold

Keep Your Accounts From Cancelling

Place a cancellation hold online for up to 5 calendar days without having to call us. Save time, money and keep commission dollars where they belong.. in the agency!

The screenshot displays a web application interface for 'Customer Service - 931-15297 - John Smith'. The main page shows account details and financials. A 'Cancellation Hold Setup' dialog box is open in the foreground, allowing the user to set a cancellation hold for the account.

Customer Service - 931-15297 - John Smith

Account Number: 931-15297 Account Name: John Smith Current / Active

Summary Customer Policies Terms Disbursements Payments Documents Balance More options

Customer Information

Account Number: 15297
Account Holder: John Smith
Main Address: 45641 Main St.
Woodland Hills, CA 91367
Agent: A34933 - Preferred Insurance Services
Main Phone: (805) 555-1234

Summary Financials

Total Premium:	5,250.00
Down Payment: (25.000 %)	1,500.00
Amount Financed:	3,750.00
Non-Refundable Fee:	50.00
Finance Charge:	98.40
Total of Payments:	3,898.40
No. of Installments:	10
Installment Amount:	389.84
APR:	8.543 %
Installments Made/Remaining:	0 / 10
Next Installment Amount:	389.84
Next Late Fee Amount:	19.49
Shortage:	0.00
Auto Assessed Late Fee Breakdown	
Account Balance (inc. fees):	3,898.40
Current Amount Due:	0.00
15-Day Payoff Calculator	\$ 3,825.00

Cancellation Hold Setup

Cancellation Hold

Account Number: 15297
Insured Name: John Smith

Next Due Date: 1/17/2020
Next Intent Date: 1/27/2020
Next Cancel Date: 2/6/2020
Current Amount Due: 0.00

New Cancellation Hold Date: 2/9/2019

Remove Hold Save Cancel

Next Intent Date: 1/27/2020
Scheduled Cancellation Date: 2/6/2020
Cancellation Hold Date: --
Next Reinstatement Date: --
Next Late Fee Date: 1/27/2020

Last Intent Date: --
Last Cancellation Date: --
Last Reinstatement Date: --

Account Options... Edit Close

[Home](#)
[Quoting](#)
[Contact Us](#)

Customer Service - 931-15297 - John Smith

Account Number: 931-15297
Account Name: John Smith
Current / Active

[Summary](#)
[Customer](#)
[Policies](#)
[Terms](#)
[Disbursements](#)
[Payments](#)
[Documents](#)
[Balance](#)
[More options](#)

Customer Information

Account Number: 15297

Account Holder: John Smith

Main Address: 45641 Main St.
Woodland Hills, CA 91367

Agent: A34933 - Preferred Insurance Services

Main Phone: (805) 555-1234

Received Date: --
Creation Date: 11/20/2017
Created By: Sean Ross
Effective Date: 12/17/2019
Archive Date: --
Balance Due Date: --

Next Intent Date: 1/27/2020
Scheduled Cancellation Date: 2/6/2020
Cancellation Hold Date: --
Next Reinstatement Date: --
Next Late Fee Date: 1/27/2020

First Due Date: 1/17/2020
Next Due Date: 1/17/2020
Final Due Date: 10/17/2020

Last Intent Date: --
Last Cancellation Date: --
Last Reinstatement Date: --

Summary Financials

Total Premium: 5,250.00

Down Payment: (25.000 %) 1,500.00

Amount Financed: 3,750.00

Non-Refundable Fee: 50.00

Finance Charge: 98.40

Total of Payments: 3,898.40

No. of Installments: 10

Installment Amount: 389.84

APR: 8.543 %

Installments Made/Remaining: 0 / 10

Next Installment Amount: 389.84

Next Late Fee Amount: 19.49

Shortage: 0.00

[Auto Assessed Late Fee Breakdown](#)

Account Balance (inc. fees): 3,898.40

Current Amount Due: 0.00

15-Day Payoff Calculator \$ 3,825.00

[Audit Log](#)
[Pay Now](#)

Account Options...
Edit
Close

View Account Information:

- Customer information
- Policy information
- Loan terms
- Loan disbursements
- Payment activity
- Account balances

Take Action:

- Make a payment online using an e-check or credit card
- Calculate a payoff amount for any future date
- View and print all notices that were previously generated on an account
- Loan disbursements
- Change your password

Policyholder Account Status

Policyholders can:

- View account summary information
- Make a payment using an e-check or credit card
- View complete payment history
- Update their address, phone and e-mail
- View and print all previously generated notices
- Change their password

The screenshot shows the 'Account Summary' page for John Smith (931-15297). The page features a navigation bar with links to Account, Payments, Policies, Documents, Billing, and Customer Information. A 'Message from your Agency' banner is visible. The account details are displayed in a table format, including account number, name, address, agent, and phone number. Below this, the account status is shown as 'Active', along with installment counts, next payment due date, current amount due, intent to cancel date, cancellation effective date, and the current account balance. At the bottom, there are buttons for 'Print Current Invoice' and 'Pay Now'.

Account Summary	
John Smith 931-15297	
Account #:	931-15297
Name:	John Smith
Address:	45641 Main St. Woodland hills, CA 91367
Agent:	Preferred Insurance Services
Agent Phone:	(805) 555-1234
Account Status:	Active
Installments Made:	0
Installments Remaining:	10
Next Payment Due On:	1/17/2020
Current Amount Due:	0.00
Intent to Cancel Date:	1/27/2020
Cancellation Effective Date:	2/6/2020
Account Balance:	3,898.40



[Print Current Invoice](#) [Pay Now >>](#)


[Privacy Policy](#)

Online Payment Options

Online Payment Service

Our e-payment feature provides a seamless option to pay online via credit card or check. Save more accounts from cancellation and keep money in your pocket!

 **e-Payment Wizard** 



Welcome to the e-Payment Wizard

This wizard will guide you through the process of making an online payment.

Payment Method

[Select an Item]

[Select an Item]

Check

Credit Card

☐ Borrower

☐ Submitted By/Agent

☒ Suspense

To continue click Next.

< Back

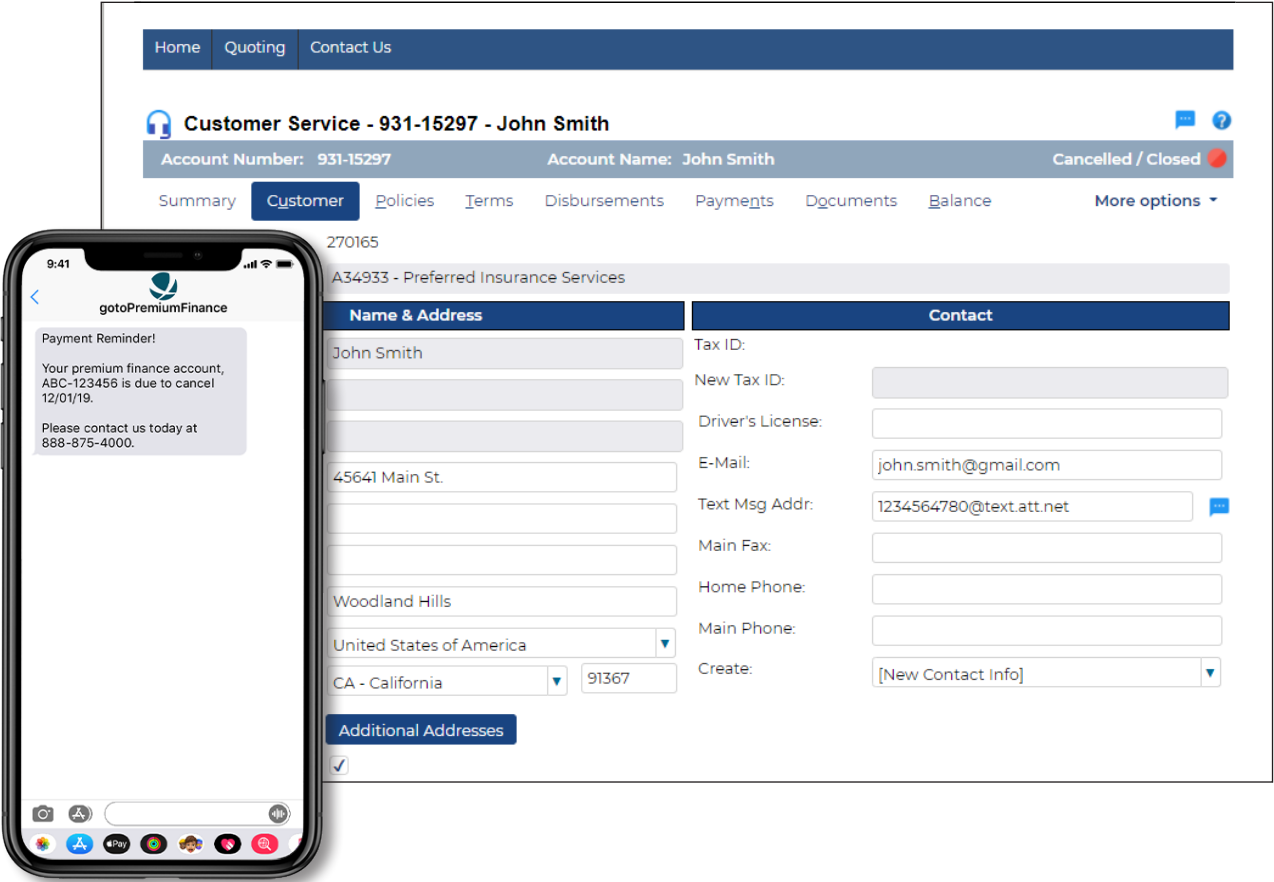
Next >

Finish

Close

Your Insureds Are On The Go, Keep Up

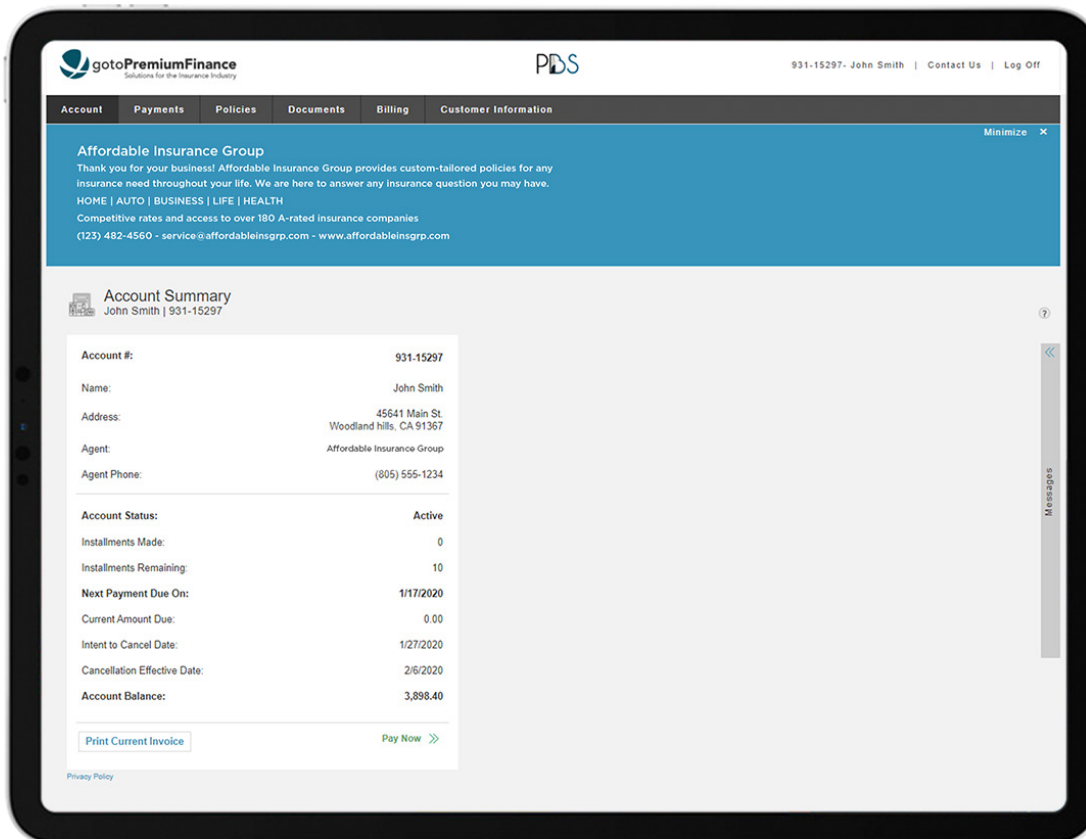
An e-mail or text message is sent to accountholders 5 days before their cancellation date to help prevent costly cancellations. Keep more of your hard-earned commission.



Grow Your Business Faster

Cross-marketing your other products and services is the fastest and easiest way to generate additional profits for your agency.

Your accountholders will receive a welcome e-mail and welcome letter that includes your personal cross-marketing message. Additionally, each time they access our portal for account information, they will see your-cross marketing message displayed.



Revenue Participation Plan

Producer Fee Options & Flexibility

You determine the fee

Spread Based Fee: Enter a dollar amount or mark up the rate to obtain the producer fee you want on each loan placed.

OR

We determine the fee for you

% of Amount Financed Fee, Default

Spread Based Fee or Fixed Dollar

Amount: A producer fee is calculated for you during the quoting process.

NOTE: Producer fees will not be paid in fee prohibited states.

Referral Fee Report

gotoPremiumFinance.com

Filter(s): Date Paid from 11/1/2020 to 11/30/2020
Fee Type: Submitted By/Agent

Option(s): Sorted by Date Paid

Friday, December 4, 2020 12:36 PM

Account Number	Insured Name	Amount Financed	# Installs	APR	Code	Paid To	Date Calculated	Date Paid	Date Disbursed	Fee Amount	Event/User Reason
15258	Platinum Trailer	720.98	9	12.969	A34933	Preferred Insurance Services	8/28/2020	11/2/2020	11/19/2020	6.23	
15359	Francisco Garza	1,091.10	10	12.949	A34933	Preferred Insurance Services	9/3/2020	11/2/2020	11/19/2020	10.29	
15412	EAV Investments	2,384.48	10	10.952	A34933	Preferred Insurance Services	9/9/2020	11/2/2020	11/19/2020	22.42	
15491	J Land Development, LLC	2,147.44	10	10.952	A34933	Preferred Insurance Services	9/11/2020	11/2/2020	11/19/2020	20.19	
15936	Jose & Maria Hernandez	597.19	10	12.948	A34933	Preferred Insurance Services	9/15/2020	11/2/2020	11/19/2020	5.63	
15951	KLG Solutions	783.82	10	12.952	A34933	Preferred Insurance Services	9/15/2020	11/2/2020	11/19/2020	7.41	
15963	Foo Man Inc	17,014.36	10	8.201	A34933	Preferred Insurance Services	9/22/2020	11/2/2020	11/19/2020	114.29	
16101	John Albertson DBA	10,651.58	10	8.198	A34933	Preferred Insurance Services	10/5/2020	11/2/2020	11/19/2020	99.30	
16200	Orozco & Co	4,736.25	10	8.950	A34933	Preferred Insurance Services	10/7/2020	11/2/2020	11/19/2020	44.27	
16238	AL Construction, LLC	10,896.75	10	8.199	A34933	Preferred Insurance Services	10/12/2020	11/2/2020	11/19/2020	101.61	
16358	Victor Moriera	597.19	10	12.948	A34933	Preferred Insurance Services	10/22/2020	11/2/2020	11/19/2020	5.63	

Report Totals

Total Count: 11

437.27

Page 1 of 1

Auto Reporting & Notice Delivery

Any report or notice can be automatically delivered to your inbox each morning, saving you time and providing added convenience in the process.

[Home](#)
[Quoting](#)
[Contact Us](#)

Reports

Reports

Cancellation Hold Report

Cancelled and Reinstated Report

Disbursement Report

Epayment Report

E-Submissions

Missing Policy Report

New Account Report

New Business Confirmation Report

Pending Cancellation Report

Quote Report

Pending Cancellation Report

Run Now

Specific Agent(s):

All Entities

Date Range Type:

Date Range

Scheduled Cancellation Date Range

Begin Date:

12/01/2019

End Date:

12/10/2019

Group By:

No Grouping

Sort By:

Cancellation Date

Pending Cancellation Report

Filter(s):

Scheduled Cancellations from 3/6/2020 to 3/15/2021

Specific Agent(s)

Affordable Insurance Services - A34850

Preferred Insurance Services - A34933

Option(s):

Sorted by Cancellation Date

Thursday, December 3, 2020 2:26 PM

Account Number	Insured Name	Agent	Installments Made	Next Due Date	Scheduled Cancellation Date	Cancellation Hold Date	Amount Due	Customer Telephone Number
931-15297	John Smith	Preferred Insurance Services - A34933	1	2/17/2020	5/15/2020	--	707.44	
931-17988	Tom's Roofing	Preferred Insurance Services - A34933	0	3/5/2020	5/15/2020	--	217.30	
931-19679	Margaret Land	Affordable Insurance Services - A34850	0	7/2/2020	7/22/2020	--	867.18	
931-19687	DP Landmarks Inc	Affordable Insurance Services - A34850	0	7/2/2020	7/22/2020	--	842.18	
931-19695	Wilfred and Mark DBA	Affordable Insurance Services - A34850	0	7/2/2020	7/22/2020	--	440.54	
931-19703	Wildflowers Bouquet Co	Affordable Insurance Services - A34850	0	7/2/2020	7/22/2020	--	797.92	
931-19711	Smith's Roofing	Affordable Insurance Services - A34850	0	7/2/2020	7/22/2020	--	797.92	
931-19729	JP Construction	Affordable Insurance Services - A34850	0	7/2/2020	7/22/2020	--	797.92	
931-19851	Aravind	Preferred Insurance Services - A34933	0	7/11/2020	7/31/2020	--	1,043.24	(325) 412-7785
931-15040	John Reynolds	Affordable Insurance Services - A34850	1	8/5/2020	8/25/2020	--	1,471.75	
931-19752	Tom's Roofing	Preferred Insurance Services - A34933	1	8/17/2020	9/6/2020	--	1,773.11	

Report Totals

Count: 11

9,756.50

Page 1 of 1

15 | The Agency Advantage

Feature	gotoPremiumFinance
Writes business in all 50 states: Easily finance in any state!	✓
Online Quoting / Account Status: Quoting & full account details is available to you 24/7 online.	✓
Quote E-submission: Digitally submit your finance agreements with one mouse click!	✓
Online Payment Options: Online check or credit card payment options for you and your insureds.	✓
Independently Owned: We're not owned by a bank so there are no channel conflict with our agents!	✓
Additional Premium Quoting Online: No phone calls to the finance company, just quote and submit!	✓
Online Payoff Calculator: Enter the payoff date for your client and receive an instant payoff.	✓
Real Time Account Access: Account information is always current whenever you log on.	✓
Online Cancellation Hold: Place a cancellation hold online (up to 5 days) & save your accounts!	✓
Digital Notice Delivery: Eliminate paper, save money and increase productivity.	✓
Digital Document Retrieval: Instant access to policy documents!	✓
Dynamic Online Reporting: Create unique reports in PDF or Excel.	✓
Customized Report Delivery: Schedule your reports when you want them!	✓
View/Print a Current Invoice: Retrieve and print an invoice on any account.	✓
Private Label Option: Maintain customer affinity by branding all documents seen by policyholders	✓
E-mail/SMS Text Message Reminders: Keep your customers informed on their smart phones!	✓
Cross-Marketing: Cross-market your other agency products and services for free!	✓