



eSign Premium Finance Only

Under Settings ► My Preferences, check the Automated Submission (eSign/Message Center Screens). If unchecked, the **eSign Premium Finance Only** button must be selected.

If no exceptions are listed, the eSign options are available.

Provider collects the down payment, sends to the Insured for signature then signs last.

I will sign last, then the insured

I have collected the down payment

Agree to the representations  
Agree to the terms by checking the box.

❖ Required to Submit PFA.

Special instructions?

Enter information only IF it is critical to processing the agreement.

Submit PFA

The screenshot shows the 'eSign' interface with the following sections:

- Electronically Sign the Agreement**: Insured Email Address field with 'demo@test.com' and a 'Required to Submit PFA' indicator.
- Who will sign the Premium Finance Agreement (PFA)?**: Radio button options where 'Insured will sign first, then I will' is selected.
- How is the down payment being handled?**: Radio button options where 'I have collected the down payment' is selected.
- Agree to and acknowledge the terms below:**: A checked checkbox followed by a list of terms including agreement to PFA and responsibility for down payment.
- Special Instructions**: A text box with 'Include Special Instructions' placeholder.
- Buttons**: 'Submit PFA', 'View PFA', 'Pay Schedule', and 'Financed per Policy'.

IPFS will email the insured Popup

Agent Sign eMail Notification

Text entered is at the top of the IPFS email.

CC yourself for a backup of the email.

The screenshot shows an email composition window with the following details:

- To:** demo@test.com
- CC Return:** (empty)
- BCC:** N/A.TotalPay.Agent@ipfs.com
- Subject:** Imperial PFS® Premium Finance Agreement for Rebecca's Craft Beer and Wine Bar
- Attachments:** PFA\_205949644-754-439e-5365-32b15413e78e.pdf
- Buttons:** Send, Cancel

When the insured completes the signature, you will be notified by eMail with a link to Sign. Log in, Agree to the representations, and choose Submit.

The screenshot shows a notification box with the following content:

- Electronic Signature Required**
- Text: Your electronic signature is required to secure the premium financing for Rebecca's Craft Beer and Wine Bar. Details: Quoter# 16993756 and FinancedPolicy.
- Agreement:**  I agree to the Producer Representations in the Premium Finance Agreement (PFA) and confirm my acceptance of the Representations and Covenants in the Electronic Authorization Agreement.
- Buttons:** Cancel, Submit

The information contained herein is confidential and proprietary. Recipients will respect the confidentiality of this material and not disclose to any third party any of the contents of this document without first obtaining written approval from Imperial PFS.



Provider signs last and sends to the insured to sign and pay the down payment.

If no exceptions are listed, the eSign options are available

Insured will sign first, then I will.

IPFS will email the Insured OR \*I will email the insured

I want IPFS to collect directly from the Insured

Agree to the representations

Agree to the terms by checking the box

Required to Submit PFA

**Electronically Sign the Agreement**

Insured Email Address  
demo@test.com  Required to Submit PFA

Separate multiple addresses with a comma.

**Who will sign the Premium Finance Agreement (PFA)?**

I will sign for myself and the Insured  
 I will sign first, then the Insured  
 Insured will sign first, then I will

**Who will direct the Insured to the payment site?**

IPFS will email the Insured Default option  
 I will email the Insured

**How is the down payment being handled?**

I have collected the down payment  
 I want to pay now using IPFS payment options  
 I want IPFS to collect directly from the Insured

agree to and acknowledge the terms below:

- I agree to the Producer Representations in the Premium Finance Agreement (PFA) and the Representations and Covenants in the Electronic Authorization Agreement.
- I understand the agreement will be fully executed upon receiving the Insured electronic signature.
- I understand I am responsible for collecting the Insured's down payment in the event the Insured fails to complete the online payment.

Funding the Markets?

Commission funding may be available.

- Choose Commission: Enter the Commission % OR the Commission \$
- Choose Fund 100% of the down payment to the Agent or the Market

Select Save

Submit PFA

Presents a copy of the signed PFA and 1 of 2 email options.

**Down Payment Funding**

Please indicate which down payment funding option you would like to use.

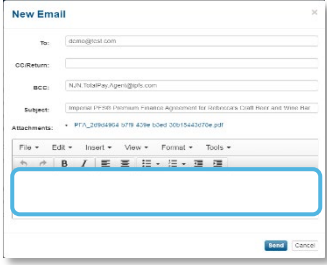
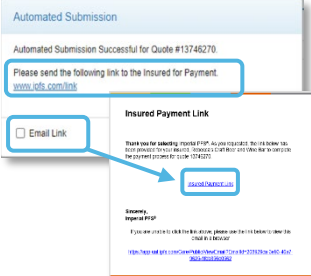
**OPTION 1**

Commission	Policy Type	Policy Premium	Policy No.	Company	General Agent	Commission %	Commission \$
OL	\$1,980.00	PENDING	LIBERTY MUTUAL INSURANCE COMPANY			6.67	100.00

Broker Fee: 0.00  
TOTAL TO YOU: 100.00

**OPTION 2**  
 Fund 100% of Down Payment to Agent

**OPTION 3**  
 Fund 100% of Down Payment to Market

<p><b>IPFS will email the insured Popup</b></p> <p>Text entered will be at the top of the IPFS email.</p> <p>CC yourself to have a backup of the email.</p> 	<p><b>*I will email the insured Popup</b></p> <p>Send yourself the link to access anytime.</p> <p>Draft your own Custom email.</p> 
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When the insured completes the signature, you will be notified by email with a link to sign. Log in, Agree to the Representations, and choose Submit. (see bottom of Page 1 for an Image)

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