



## *Westfield Bank Premium Finance tips*

As a valued customer, Westfield Bank has created a series of useful tips that may save you valuable time. We hope that this information will make it easier to do business with us, and most importantly, your customers.

For your convenience, you can contact Westfield Bank's Premium Finance team for assistance at [premiumfinance@westfield-bank.com](mailto:premiumfinance@westfield-bank.com).

### *PBS quote editing*

#### **Quote Editing**

A quote will lock once a finance agreement is generated. However, simply copy the quote by searching for the existing quote and then click on the icon that looks like two overlapping pages to the right of the listing. You can now make changes to the new quote.

#### **Renewal simplicity**

Simply search for the prior year's quote and use the copy feature mentioned above to create a new quote. Edit effective date(s), premium(s), etc. and save renewal quote with ease.

#### **Additional premium endorsements**

Select Quoting, then New Ap Quote and simply type in the client's name or the 5-digit account number (i.e. 12345 of account WFB-12345). Follow the prompts to input new policy/endorsement information. Print the new document, collect the down payment, sign the document, and email it back to Westfield Bank. This contract will disclose the terms of the Additional Premium only; however, the terms of repayment on the existing account are modified to include the new loan proceeds. The insured will make one combined payment.

#### **Revising payments following returned premium**

If an account has more than one policy and a policy is cancelled, the Return Premium is mailed to Westfield Bank and applied against the outstanding balance – not toward payments. After the funds are applied, we will manually select Recalculate Remaining Payments with a phone call or email request from the agency.

### *Notices customization*

#### **Agency notices availability**

Notices can be received on the same day they are generated. Your agency can select the preferred method of delivery, including email, fax, and/or regular mail. We can even customize the method of delivery by type of notice.

#### **Adding a General Agent or broker**

Add to quote under General Agent so that the Notice of Cancellation will be sent to either.

## *Editing addresses on file*

### Adding a P.O. Box

Please enter the Physical Address on the customer information page. If a P.O. Box is applicable, please enter under the “Additional Address” tab and select “Mailing Address.”

### Updating existing account addresses:

Search for existing account: Enter customer name or 5 digits of account number in the search bar on the home page. Select the Customer Tab and Edit. Update address or add secondary mailing address. Confirm change by following the two Save prompts.

## *Account capabilities*

### Account access

Access customer account by using the search box on the Premium Finance home page.

### Summary tab

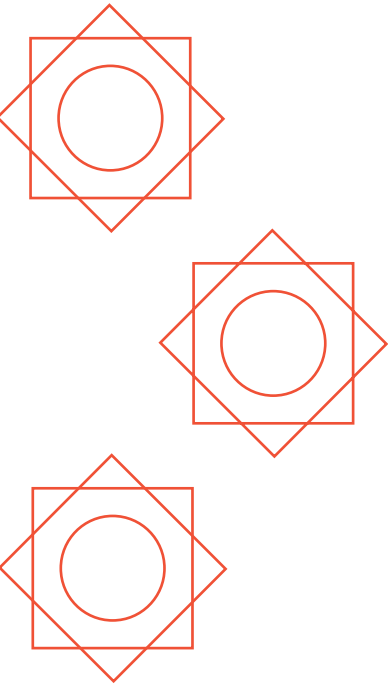
The Summary tab includes due date, intent, cancellation, and reinstatement dates along with the current amount due and 14-day payoff figure. Edit allows the agency to Extend Cancellation Date up to 5 days and use our Payoff Calculator.

### Customer tab

The Customer tab allows for editing of the customer address and/or phone number, and for adding a secondary mailing address.

### Documents tab

The Documents tab allows your agency to view documents, generate customer coupons, and customer ACH authorization forms.



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