

**BUDGET INSTALLMENT CORPORATION**  
**1050 FRANKLIN AVENUE – SUITE 204**  
**GARDEN CITY, NY 11530**  
**PHONE: (800) 557-3000 FAX: (877) 678-2235**  
**WWW.BICFINANCE.COM**



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**HOW-TO QUOTE IN FINANCEPRO**

1. Go to: [bicfinance.financepro.com](http://bicfinance.financepro.com)
  - Enter: “username” and “password”
  - Click: “Log In”
  - Click: “Quotes”
2. Go to “Insured” and click “New”
  - Enter “Insured’s Name” (*Please use the name you wish to appear on PFA and all notices*)
  - Enter insured’s “phone” and “address”
  - Enter insured’s FEIN or the principal’s SSN and DOB. (*If none yet, please put “X,” but note that the signed agreement cannot be processed without it*)
  - Click: “Save All”
3. Click: “Add Policy”
  - Begin typing the “insurance company” and click on the carrier you wish to select
  - Begin typing the “general agent” and click on the agent you wish to select (*If none, please leave blank*)
  - Enter in “policy number” (*If none yet, please leave blank*)
  - Enter “coverage type” by pressing the first letter of the coverage you’d wish to find and then click the appropriate coverage
  - Enter “gross premium”
  - Enter “minimum earned premium,” if any
  - Enter cancellation terms (*If standard, leave the default terms*)
  - Enter “effective date” in MM/DD/YYYY format or click on calendar and select date
  - Choose “policy term” length
  - Enter fees where applicable (*will be added to down payment, as fees aren’t financeable*)
  - Enter “tax/stamp fee” (*this will be included in amount financed*)

- Check off “short rate,” “auditable,” and “PUC/Filings” (*these include ICC filings*), if appropriate
  - Click “save policy”
4. To add another policy, go back to “Step 3.” To continue, click: “terms”
    - Click: “billing schedule” and select monthly or quarterly
    - Choose applicable “rate table”
    - Select payment method: ACH, coupons, statements
    - Click: “View Agreement”
  5. To print:
    - Click on the printer in the upper left corner of the screen OR Press Ctrl+P on your keyboard
  6. Press “Return to the quote” to re-evaluate terms OR
    - Press “Quotes” to do another quote OR
    - Press “Logout” to leave the site

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### **Retrieving Quotes in FinancePro**

1. Go to: bicfinance.financepro.com
  - Enter: “username” and “password”
  - Click: “Log In”
  - Click: “Quotes”
2. Type in any information to locate a booked account (e.g. quote number or insured)
  - Click: “Find”
  - This will bring up the quote you’ve requested and enable you to make any necessary corrections

*Please contact us at (800) 557-3000 with any questions and thank you for choosing BIC Premium Finance.*