

Welcome to Aspire's New Arizona Policy Point of Sale System



ASPIRE
GENERAL INSURANCE

STEP 1- Bridge to Aspires System to Run a Report

After inputting the information into your comparative rater, you will land directly on the Rate screen, bypassing Drivers, Incidents, Vehicles, Coverages, and Questions.

Staging

Broker Tools

Quotes And Policies

Dashboard

New Quote

New Endorsement

Apex

For Aspire Brokers

Apex is the Aspire application platform for the next generation of broker tools.

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Insured License Number

1800012020

NAIC N Number

15290

Drivers

Incidents

Vehicles

Coverages

Questions

Quote #3415 TYLER NICHOLSON

5/12/2025 — 11/12/2025 (6 months)

eDocuments (emailed documents)

Edit

Below are rate estimates based on the information you have provided. If you wish to receive a final calculation of rates and select a payment plan, please click 'Run Reports'.

Rate selection

Run Reports

Bank Transfer (EFT)

Direct Mail Billing

Credit Card (RCCP)

Payment Plan	Auto Payment Method	Due Today	Due Monthly	# of Monthly Payments	Total Bill
6-Month Balanced	EFT	\$290.90	\$234.72	5	\$1,464.50
6-Month Lowest Down (EFT only)	EFT	\$236.78	\$236.23	5	\$1,417.93
6-Month Lowest Monthly	EFT	\$382.76	\$216.16	5	\$1,463.56
6-Month Balanced	NONE	\$294.90	\$238.72	5	\$1,488.50
6-Month Lowest Down-First Bill Due in 22 Days	NONE	\$248.55	\$247.99	5	\$1,488.50
6-Month Lowest Monthly	NONE	\$386.76	\$220.16	5	\$1,487.56
6-Month Paid in Full	NONE	\$1,406.37	\$0.00	0	\$1,406.37

STEP 2- Select a Payment Plan

On the Rate screen, you can either select payment plans that suit your client, or keep the existing options. For example, you might decide to enable only Recurring Credit Card Payment (RCCP). After making your choice, click 'Next'.

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Quote #3415 TYLER NICHOLSON

5/12/2025 — 11/12/2025 (6 months) eDocuments (emailed documents) Edit

Below are rate estimates based on the information you have provided. If you wish to receive a final calculation of rates and select a payment plan, please click 'Run Reports'.

Rate selection

☐ Bank Transfer (EFT) ☐ Direct Mail Billing ☒ Credit Card (RCCP)

Payment Plan	Auto Payment Method	Due Today	Due Monthly	# of Monthly Payments	Total Bill
6-Month Balanced	RCCP	\$290.90	\$234.72	5	\$1,464.50
6-Month Lowest Down (RCCP) - First Bill Due in 22 Days	RCCP	\$236.78	\$236.23	5	\$1,417.93
6-Month Lowest Monthly	RCCP	\$382.76	\$216.16	5	\$1,463.56

Run Reports

Back Next

Please Note: If you choose the EFT/ RCCP (recurring credit card payment) option, you will be prompted to enter bank information for future payments.

STEP 3- Run Initial Reports

Click 'Run Reports'.

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5/12/2025 — 11/12/2025 (6 months) eDocuments (emailed documents) Edit

Below are rate estimates based on the information you have provided. If you wish to receive a final calculation of rates and select a payment plan, please click 'Run Reports'.

Rate selection

Bank Transfer (EFT) ☒

Third Party Reports

- 1 Data Check
Checking the policy
20%
- 2 Get some more details
- 3 Run reports

Restart Close

Due Monthly	# of Monthly Payments	Total Bill
\$238.72	5	\$1,488.50
\$247.99	5	\$1,488.50
\$220.16	5	\$1,487.56
\$0.00	0	\$1,406.37

Payment Due Date	Payment Amount
05/12/2025	\$294.90
06/15/2025	\$238.72
07/15/2025	\$238.72
08/15/2025	\$238.72
09/15/2025	\$238.72
10/15/2025	\$238.72

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Next >

STEP 3 Continued- Run Initial Report

If any information is missing. You will be prompted to edit this screen.

Third Party Reports

- ✓ Data Check
- 2 Get some more details
- 3 Run reports

We're missing the full 17 character VIN number for the **2009 Honda PILOT TOURING UTL4X44D**. Can you please fill it in before continuing?

Vehicle Identification Number (Required)

2HKYF488&9

❗ The Vehicle Identification Number should be at least 17 characters long.

Year: 2009
Make: HONDA
Model: PILOT TOURING
Body Style: UTL4X44D

Verify VIN

Next

Restart Close

Quote #4536 TYLER NI
5/22/2025 — 11/22/2025 (6 mo)

Below are rate estimates for

Rate selection

Bank Transfer (EFT)

Due Monthly	# of Monthly Payments	Total Bill
\$200.22	5	\$1,247.87
\$207.89	5	\$1,247.87
\$184.09	5	\$1,247.11
\$0.00	0	\$1,065.07

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STEP 3 Continued- Run Initial Report

Click, 'Agree'.
Select 'Yes,
Run Reports'.

Staging

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5/12/2025 — 11/12/2025 (6 months) eDocuments (emailed documents) Edit

Below are rate estimates

Rate selection

Bank Transfer (EFT)

Third Party Reports

- ✓ Data Check
- ✓ Get some more details
- 3 Run reports

The Federal Fair Credit Reporting Act, Driver's Privacy Protection Act, analogous state laws, and other state and federal laws govern the use of reports delivered via the system. It is your responsibility to ensure that your requests are lawful. When ordering reports for underwriting purpose, you must have a completed application and/or the verbal request of the subject consumer.

The Federal Fair Credit Reporting Act imposes criminal penalties -- including a fine, up to two years in prison, or both -- against anyone who knowingly and willfully obtains information on a consumer from reporting agency under false pretense, and other penalties for anyone who obtains such consumer information without a permissible purpose.

☒ I Agree

Run the reports?

Yes, run reports

Restart Close

Run Reports

Due Monthly	# Monthly Payments	Total Bill
\$238.72	5	\$1,488.50
\$247.99	5	\$1,488.50
\$220.16	5	\$1,487.56
\$0.00	0	\$1,406.37

Payment Due Date	Payment Amount
05/12/2025	\$294.90
06/15/2025	\$238.72
07/15/2025	\$238.72
08/15/2025	\$238.72
09/15/2025	\$238.72
10/15/2025	\$238.72

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STEP 3 Continued- Run Initial Reports

The report will begin to run.

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5/12/2025 — 11/12/2025 (6 months)

eDocuments (emailed documents)

Edit

Below are rate estimates for

Rate selection

Bank Transfer (EFT)

Run Reports

Due Monthly

of Monthly Payments

Total Bill

\$238.72

5

\$1,488.50

\$247.99

5

\$1,488.50

\$220.16

5

\$1,487.56

\$0.00

0

\$1,406.37

Payment Due Date

Payment Amount

05/12/2025

\$294.90

06/15/2025

\$238.72

07/15/2025

\$238.72

08/15/2025

\$238.72

09/15/2025

\$238.72

10/15/2025

\$238.72

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Next

Third Party Reports

✓ Data Check

✓ Get some more details

3 Run reports

Run the reports?

Initializing...

5%

Restart

Close

STEP 3 Continued- Run Initial Reports

Nothing was found on the report.
Click, 'Accept'

Staging

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5/12/2025 — 11/12/2025 (6 months)

eDocuments (emailed documents)

Edit

Report Info

Please review the following information that was provided by our third-party reporting providers.

Tyler Nicholson

Applicant, Born December **, 1981

Accidents

No accidents were located.

Violations

No violations were located.

Household members

There are no extra household members that were located.

Close

Accept

6-Month Lowest Down-First Bill Due in 22 Days

NONE

\$248.55

\$247.99

5

\$1,488.50

6-Month Lowest Monthly

NONE

\$386.76

\$220.16

5

\$1,487.56

6-Month Paid in Full

NONE

\$1,406.37

\$0.00

0

\$1,406.37

STEP 4- Run Additional Reports

Click 'Order Additional Reports', choose 'Yes, Run Reports' again, review results, then click 'Accept'

Broker Tools
Quotes And Policies

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New Endorsement

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5/12/2025 — 11/12/2025 (6 months) eDocuments (emailed documents) Edit

Changes in Premiums for the 6-Month Balanced schedule with no auto payments

	Down	Monthly	Total	Difference
				▼ \$35.54
				▼ \$28.43
				▼ \$177.69

Below are rate estimates for the 6-Month Balanced schedule. Please click 'Order Additional Reports'.

Rate selection

Bank Transfer (EFT) ☒

Payment Plan	Auto Payment Method	Due Today	Due Monthly	# of Monthly Payments	Total Bill
6-Month Balanced	NONE	\$259.36	\$210.29	5	\$1,310.81
6-Month Lowest Down-First Bill Due in 22 Days	NONE	\$218.92	\$218.38	5	\$1,310.81
6-Month Lowest Monthly	NONE	\$342.38	\$193.53	5	\$1,310.01

Third Party Reports

- ✓ Data Check
Checking the policy
100%
- 2 Get some more details
- 3 Run reports

Restart Close

Order Additional Reports

STEP 5- Choose Payment Plan

Select which billing plan to move forward. Click, 'Next'.

Staging

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Monthly	\$220.16	\$193.53	\$26.63
Total	\$1,487.56	\$1,310.01	\$177.55

Rate selection

Re-Run Reports

☐ Bank Transfer (EFT) ☒ Direct Mail Billing ☐ Credit Card (RCCP)

Payment Plan	Auto Payment Method	Due Today	Due Monthly	# of Monthly Payments	Total Bill
6-Month Balanced <input type="radio"/>	NONE	\$259.36	\$210.29	5	\$1,310.81
6-Month Lowest Down-First Bill Due in 22 Days <input type="radio"/>	NONE	\$218.92	\$218.38	5	\$1,310.81
6-Month Lowest Monthly <input checked="" type="radio"/>	NONE	\$342.38	\$193.53	5	\$1,310.01
6-Month Paid in Full <input type="radio"/>	NONE	\$1,231.60	\$0.00	0	\$1,231.60
#	Payment Due Date		Payment Amount		
1	05/12/2025		\$231.15		
2	06/15/2025		\$105.05		
3	07/15/2025		\$105.05		
4	08/15/2025		\$105.05		
5	09/15/2025		\$105.05		
6	10/15/2025		\$105.04		

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STEP 6- Review and Edit Details

You will be directed to this summary page. From the Summary Page, you can edit vehicles, upload documents, change the address or effective date, and select doc delivery method. Click 'Next'.

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Drivers

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Questions

Quote #3415 TYLER NICHOLSON

5/12/2025 — 11/12/2025 (6 months)

eDocuments (emailed documents)

Edit

Policy Details

Policy Number	Created Date	Last Modified Date	Effective Date	Expiration Date
Not yet bound	05/12/2025	05/12/2025	05/12/2025	11/12/2025

Location of Policy

Garaging Address

8578 E Indian School Rd UNIT J, SCOTTSDALE, AZ, 85251

Mailing Address

8578 E Indian School Rd UNIT J, SCOTTSDALE, AZ, 85251

Edit

Driver Details

First Name	Middle Name	Last Name	Date of Birth	Gender	Relation to Applicant
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STEP 7- Process Payment for Down Payment

Choose your preferred payment method. For demonstration purposes, “Agency Trust” has been selected. Please choose the most applicable option for your specific client.

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Broker Tools
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Confirm and Pay – Quote #4536 TYLER NICHOLSON

Please select the payment methods you would like to use for a payment.

Choose a Down Payment method

Agency Trust ✓

Credit Card

Bank Transfer

You have chosen not to set up automatic payments. Your recurring bill will be sent to you by mail to 8578 E Indian School Rd J Scottsdale, AZ 85251.

Confirm Recurring Direct Mail Billing

Down Payment Method	Agency Trust Reset	\$265.62
Monthly Payment Method		\$215.30

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STEP 7 Continued- Process Payment for Down Payment

Click 'Confirm'.

Staging

Broker Tools

Quotes And Policies

Dashboard

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NAIC N Number

15290

Confirm and Pay – Quote #4536 TYLER NICHOLSON

Please select the payment methods you would like to use for a payment.

Choose a Down Payment method

Agency Trust ✓

Card

Bank Transfer

You have chosen not to set up automatic payments. Your recurring bill will be sent to you by mail to 8578 E Indian School Rd J Scottsdale, AZ 85251.

Confirm Recurring Direct Mail Billing

Down Payment Method

Agency Trust

Reset

\$265.62

Monthly Payment Method

\$215.30

Back

STEP 7 Continued- Process Payment for Down Payment

Review, and then click, 'Accept'.

Staging

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New Endorsement

Apex
For Aspire Brokers

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Insured License Number
1800012020

NAIC N Number
15290

Confirm and Pay – Quote #3415 TYLER NICHOLSON

Please select the payment methods you would like to use for a payment.

Choose a Payment method

Payment Method

Bank Transfer

\$1,231.60

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Payment Confirmation

You represent that you are the owner and/or an authorized signer of the account.

You also understand that your policy may cancel or expire if there are insufficient funds in the account, which could cancel this agreement and remove the policy from automatic payment processing. In addition to any fees charged by the bank, Aspire may charge a return item fee of up to \$25.00 if the payment is dishonored or returned for any reason.

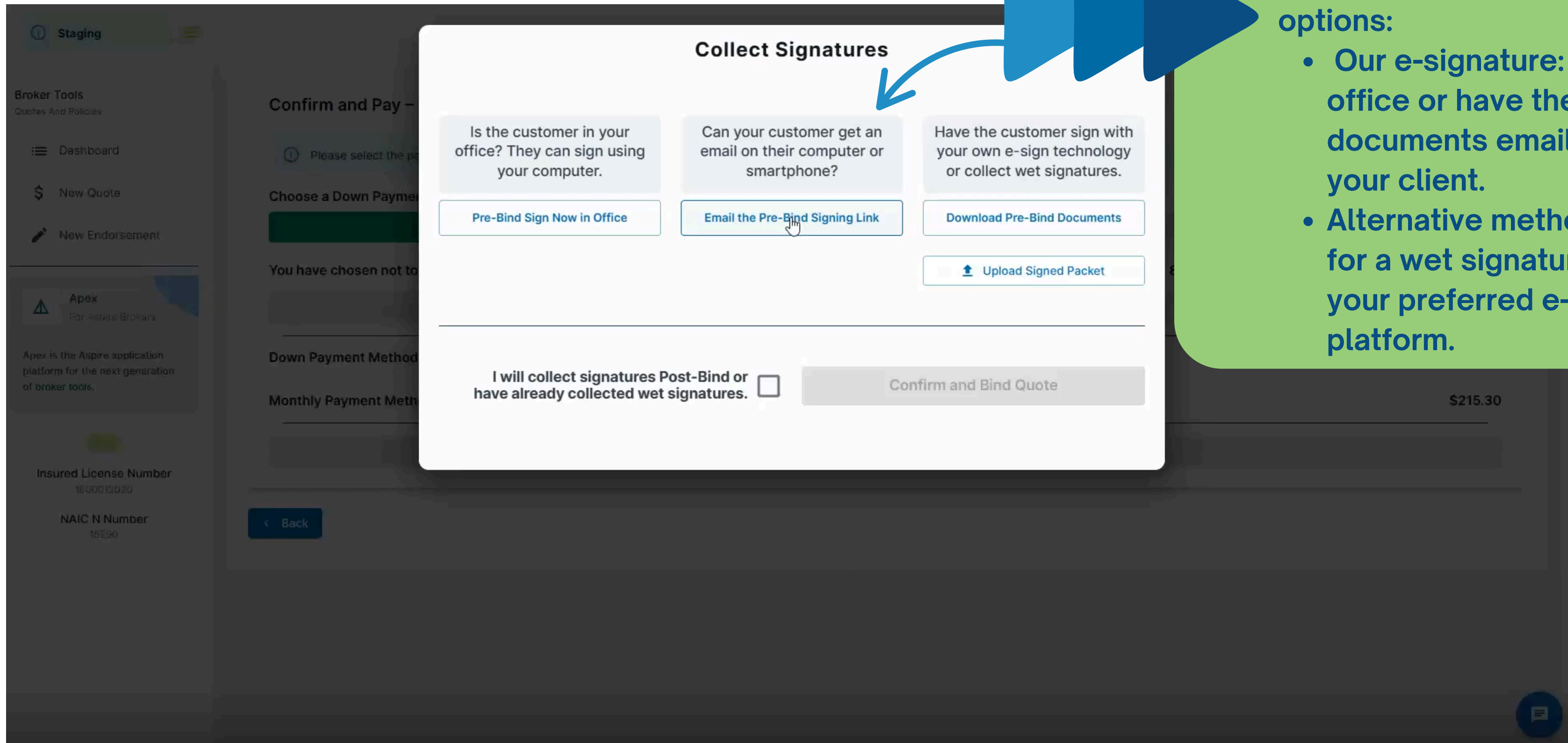
Please note that due to payment processing time, your transaction may not post to your account immediately. If your scheduled due date falls on a weekend or holiday, your payment will be posted on the next business day. You will not be receiving any further billing notices. You will receive confirmation of this enrollment and a schedule of payment with renewals by mail in 5-7 business days.

Should you wish to change or terminate the Electronic Payment information, please contact us at least 7 days prior to your scheduled due date.

Do you understand and accept the terms of the agreement?

Cancel Accept

Step 8- eSign Documents



Collect Signatures

Is the customer in your office? They can sign using your computer.

Can your customer get an email on their computer or smartphone?

Have the customer sign with your own e-sign technology or collect wet signatures.

[Pre-Bind Sign Now in Office](#)

[Email the Pre-Bind Signing Link](#)

[Download Pre-Bind Documents](#)

[Upload Signed Packet](#)

I will collect signatures Post-Bind or have already collected wet signatures. ☐

[Confirm and Bind Quote](#)

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It's time to sign your Aspire policy documents! Choose from these convenient options:

- Our e-signature: Sign in-office or have the documents emailed to your client.
- Alternative methods: Print for a wet signature or use your preferred e-signature platform.

Step 8 Continued- eSign Documents

Tyler Nicholson

Authorize Sign

Enter Your Name and Initials

Signature

Draw Custom Signature and Initials

Initials

Clear Custom

The name entered above will be used as legal authorization for the following documentation.

☒ I agree to the [Terms & Conditions](#)

Preview

Sample Document

Please Sign Below:

Signature

Initials

If your customer is in office and would like to select the, Pre-bind sign now in office. This screen will populate and the customer may complete the eSign process. Under no circumstances may a producer or agent complete these steps on behalf of the client.

Your timezone is automatically detected to be (UTC-08:00) Pacific Time (US & Canada). [Change](#)

Step 8 Continued- eSign Documents

After choosing your preferred method of obtaining the policy holders signature, click 'Bind Quote' to continue.

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Confirm and Pay – Quote #4536 TYLER NICHOLSON

Please select the payment methods you would like to use for a payment.

Choose a Down Payment method

Agency Trust ✓

Credit Card

Bank Transfer

You have chosen not to set up automatic payments. Your recurring bill will be sent to you by mail to 8578 E Indian School Rd J Scottsdale, AZ 85251.

Confirm Recurring Direct Mail Billing

Down Payment Method

Agency Trust

Reset

\$265.62

Monthly Payment Method

Direct Mail

\$215.30

View Payment Confirmation

The customer has signed the documents. You may now bind the policy.

Bind Quote

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Step 9- Review Final Documents

On this page, you can view and download all policy documents. You can also upload additional documents (like photos for comprehensive/collision coverage) or resend eSign links.

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✓ Your policy has bound successfully!

Your Policy Number is: **PAAZ-00002798-00**

Policy Documents

	GBL-074 (07/2022) Roadside (Post-bind)	<div>Download</div>
	PAAZ-002 (05/2025) Application (Post-bind)	<div>Download</div>
	PAAZ-003 (04/2023) UM and UIM Offer (Post-bind)	<div>Download</div>
	PAAZ-026 (04/2023) Aspire New Business Checklist (Post-bind)	<div>Download</div>
	PAAZ-030 (04/2023) AZ Auto ID Cards (POS)	<div>Download</div>
	PAAZ-033 (04/2023) Power of Attorney – Authorization to Release Vehicles (Post-bind)	<div>Download</div>
	PAUS-022 (11/2024) Courtesy Notice (Post-bind)	<div>Download</div>
	PAUS-053 (04/2023) Homeowner Discount Verification (Post-bind)	<div>Download</div>

Upload File

Download All

< Back

Step 9 Continued- Review Final Documents

Select,
'Download All' to
download the full
policy package.

The screenshot displays the 'Staging' environment of the Aspire Brokers application. The left sidebar contains navigation links for 'Broker Tools' (Quotes And Policies, Dashboard, New Quote, New Endorsement) and an 'Apex' section for Aspire Brokers. The main content area shows a success message: 'Your policy has bound successfully! Your Policy Number is: PAAZ-00002798-00'. Below this is the 'Policy Documents' section, which lists eight documents with their respective dates and statuses. At the bottom of this list is an 'Upload File' button. To the right of the document list is a vertical column of 'Download' buttons for each document, and a 'Download All' button at the bottom. A green callout box with three arrows points to the 'Download All' button, indicating the next step in the process.

Policy Documents

Document ID	Document Name	Status
GBL-074	(07/2022) Roadside	(Post-bind)
PAAZ-002	(05/2025) Application	(Post-bind)
PAAZ-003	(04/2023) UM and UIM Offer	(Post-bind)
PAAZ-026	(04/2023) Aspire New Business Checklist	(Post-bind)
PAAZ-030	(04/2023) AZ Auto ID Cards	(POS)
PAAZ-033	(04/2023) Power of Attorney – Authorization to Release Vehicles	(Post-bind)
PAUS-022	(11/2024) Courtesy Notice	(Post-bind)
PAUS-053	(04/2023) Homeowner Discount Verification	(Post-bind)

[Upload File](#)

[Download All](#)

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Step 10- Access the Policy

Staging

Broker Tools

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Insured License Number

1800012020

NAIC N Number

15290

✓ Your policy has bound successfully!

Your Policy Number is: **PAAZ-00002798-00**

View in Policy Management

Policy Documents

GBL-074 (07/2022) Roadside (Post-bind)

PAAZ-002 (05/2025) Application (Post-bind)

PAAZ-003 (04/2023) UM and UIM Offer (Post-bind)

PAAZ-026 (04/2023) Aspire New Business Checklist (Post-bind)

PAAZ-030 (04/2023) AZ Auto ID Cards (POS)

PAAZ-033 (04/2023) Power of Attorney – Authorization to Release Vehicles (Post-bind)

PAUS-022 (11/2024) Courtesy Notice (Post-bind)

PAUS-053 (04/2023) Homeowner Discount Verification (Post-bind)

Download

Download

Download

Upload File

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Click, 'View in Policy Management' to access policy details.

Step 10 Continued- Access the Policy

You are now in policy home. From here you can view activities, receipts, and point of sale documents.

ASPIRE

Quote SearchPolicy SearchActivity SearcheSign PacketsReports

Policy Number
PAAZ-00002464-00

Policy Status
Active

Policy Period
5/12/2025 – 11/12/2025

Balance
\$0.00

Policy Home

Billing and Payments

Policy Details

Documents

Claims

Endorsement History

Activities

Digital Wallet

Policy Coverages

Bodily Injury 25/50

Property Damage 15

UIM Bodily Injury 25/50

Medical payments 500

Roadside Membership Enrolled

Vehicles

HONDA PILOT TOURING (2009)

Comprehensive 500

Comprehensive Full Glass

Collision 500

Tow / Storage

Special Equipment

Rental Reimburse

Additional Info

Additional Info

Deductible Discount Endorsement

Home Ownership Type rent

Permissive Use Endorsement No

Type of Home apartment

Policy Discounts

Deductible Discount No

Homeowner Discount No

Multi-Car Discount No

Paid In Full Discount Yes

Prior Coverage Discount No

Recurring Payment Discount No

Policy Discounts Applied

Policy Discounts Applied AZ Paid in Full Discount

Open chat

**Congratulations, you have now
completed the  ASPIRE GENERAL INSURANCE Rater
Training!**