

Signio My F&I

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The Signio **“My F&I” functionality** allows the F&I and Dealer Information to be **maintained and confirmed** on a scheduled timeframe in order to ensure the information is **up to date and compliant** in terms of the FSB legislation.

This functionality caters for **accreditation, licence and Section 13 information**, to be captured and maintained within the **Signio Boardroom (available in the menu bar on the left of the Signio Boardroom)**:

!

The following fields can be edited: Surname, fidelity and indemnity clause selection, working under supervision, default IGF and cell number can be changed. Any additional amendments required to fields that cannot be edited are to be sent to Signio for updating.



[Click here](#)

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Select the **“My F&I”** tab from the Boardroom.

There are **three areas that provide the information required** by legislation:

F&I Information

- The F&I Information displays general information regarding the F&I, as well as Indemnity & Fidelity, IGF, and a “fit and proper declaration”.
- The following field can be edited- Surname, fidelity and indemnity clause selection, working under supervision, default IGF and cell number can be changed.
- Any required amendments to fields that cannot be edited are to be sent to Signio for updating.
- Select any 3rd party IGF vendor as default and view the available vendors as per association. Should the Dealer require additional SP Vendors to be associated this can be requested and only be enabled by contacting Signio Support.

FSP Information

- The FSP section of “My F&I” shows the FSP license assigned to the Dealer by the Signio Management platform. The relevant Compliance Officer responsible per FSP is also reflected.
- Upload, display and email a Section 13 certificate where required.
(Please note: ONLY the Section 13 certificate can be uploaded).

F&I Licenses and Accreditations

- You can select any, or all of the applicable options and upload your NCA card in this section.

Click on the **“Save/update”** button at the bottom of the screen to **confirm** all information:

F&I Information			
F&I Name	<input type="text" value="Koos"/>	F&I Surname	<input type="text" value="Roos"/>
ID Number	<input type="text" value="8303215471244"/>	Phone Number	<input type="text" value="0726682154"/>
Cell Number	<input type="text" value="0726682154"/>	Email	<input type="text" value="a@a.co.za"/>
Notification Method	<input type="text" value="Select One..."/>	Indemnity and Fidelity	<input type="text" value="Select One..."/>
IGF	<input type="checkbox"/> NO	Other Split Premium Provider	<input type="text" value="Select One..."/>
UNDER SUPERVISION: <input type="checkbox"/> * The Representative is not providing a service under supervision.			

FSP and NCA			
FSP Number	<input type="text" value="1231321321"/>	Compliance Officer	<input type="text"/>
Phone Number	<input type="text"/>	Fax Number	<input type="text"/>
Email	<input type="text"/>		
Section 13 Certificate	<input checked="" type="checkbox"/> YES	Filename3.csv	<input type="button" value="Choose File"/>
<div style="border: 1px solid black; padding: 5px;"><p>Section 13 Certificate</p><input type="text"/><input type="button" value="Email"/></div>			

Accreditation and License Information			
Insurance License(s)		Other Accreditations	
Long Term Insurance : Category A	<input type="checkbox"/> NO	FAIS 1	<input type="checkbox"/> NO
Long Term Insurance : Category B1	<input type="checkbox"/> NO	FAIS 2	<input type="checkbox"/> NO
Short Term : Personal Lines	<input type="checkbox"/> NO	RE 1	<input type="checkbox"/> NO
Short Term : Commercial Lines	<input type="checkbox"/> NO		
NCA Accreditation			
! NCA Accredited	<input type="checkbox"/> NO	Filename3.csv	<input type="button" value="Choose File"/>
<div style="border: 1px solid black; padding: 5px;"><p>NCA Preview</p><input type="text"/><input type="button" value="Email"/></div>			



Click here

If you ever need help, contact us...