

Customer Spotlight

How ftwilliam.com's software increases productivity so you can focus more time on your clients, and your firm's growth.

This customer spotlight is based on an interview with **Cynthia Beaulaurier**, Manager of Retirement Plan Services, Magnuson, McHugh & Co.



Finding a higher-quality document software system

One of the goals of Magnuson, McHugh & Co is to provide their clients with the best possible retirement plan that fits their client's business' needs – some of whom have unique and custom design needs. Another goal of the firm is to grow their retirement plan services. As Manager of Retirement Plan Services, Cynthia Beaulaurier realized that their current software was not the right fit in order to meet these goals, so she set out to find a better, higher-quality document software system.

She joined ftwilliam.com just after the 10/15 deadline of 2015. Like many firms changing software systems, she was most concerned about converting from her previous document provider to ftw. To her surprise, she found the process to be "AWESOME!"

"It really was. Whenever you undertake something like this you are always kind of prepared for the worst case scenario, but everything converted beautifully."

Timely responses and support every step of the way

The ftwilliam.com support team was there for her every step of the way: making sure the data moved over seamlessly, giving her tips on what to look for, creating flexible solutions to some of her unique client needs, and providing live demos and trainings on how things work. ftwilliam.com's customer support is "*fantastic – timely responses, and people who listen and understand that it's all new and foreign to you.*"

User friendly and profitable from the start

Her previous vendor required manual coding of information into individual modules, which resulted in duplication and extensive cross-checking. ftwilliam.com's fully integrated modules allowed Cynthia to immediately save a significant amount of time and effort on document logistics and allow her to focus more on helping her clients.

"As a TPA firm, we have to track our time to every 6 minutes and your plan document system is so user friendly that I was able to track and see 'Was I profitable in doing this?' and we were. So, not only was everything brand new in switching over, but it was profitable for us right out of the gate."

To learn more, please visit ftwilliam.com or call **1-800-596-0714**