



ftwilliam.com Software: *ftwPortal Pro*



The ftwilliam.com portfolio is fully web-based software that streamlines time-consuming tasks for the employee benefits professional. The applications are easy to use and integrated to ensure that data flows effortlessly between the different modules.

The **ftwPortal Pro** module offers secure two-way access by plan sponsors and other related parties to plan documents, government forms, census, and other secure data.

Software Highlights

- **Post Annual Notices and Required Amendments**—Prepare your notices and amendments and post them to the web portal. If you purchase access to our documents software, you may do this in batch mode.
- **E-sign Documents**—Clients can e-sign amendments, plan documents, and other miscellaneous documents via the web portal just like 5500s.
- **Document Manager**—This feature allows you to load documents and forms, miscellaneous announcements, newsletters, and more to the web portal. Do this individually or in batch mode.
- **Message Manager**—Send secure messages to the web portal for your clients to read.
- **Streamlined Census and Annual Questionnaire Collection and Delivery**—Choose from batch delivery or online electronic completion on the portal, and seamlessly import the information directly into our Admin software.
- **Reminders**—Send notifications reminding your clients to download a message or a document, e-sign, and more.
- **Automatic Delivery of Documents and Supporting Forms**—If you're using our documents software, you may automatically deliver documents and supporting forms directly to the portal.
- **Batch Documents**—Send a file for multiple plans at one time or customized documents for all plans at one time.
- **Download History**—Track portal activity in one place and apply filters for easier searching.
- **Branding**—Portal branding available.
- **To-Do List**—All of your clients' tasks listed in one easy-to-read to-do list when logged into the web portal.
- **Client and document** classifications available and customizable.
- **Unlimited portal users and customizable access**—Customers may have unlimited portal users and customize what type of access each will have.
- **Folders**—Create folders to place your documents in via the web portal. This provides better organization and makes it easier to find documents once they are loaded to the portal.