

ftwilliam.com Software: Compliance Testing and Reporting Module



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 **Compliance Module** helps you manage your plans' testing and reporting with ease, and streamline your census preparation.

Software Highlights

- Complex/Multi-Tiered Contribution Allocations
- Safe Harbor/Top Heavy and Gateway Minimums
- Self-Employed Calculations
- Balance Forward Accounting/ Participant Statements
- Transaction Import/Export
- Extensive Census Data Scrub
- Auto Solving for failed Gateway and Rate Group tests
- Workflow management helps you supervise all your compliance tasks. Track status of census data, compliance testing, and report preparation
- Loan Module allows you to automatically generate promissory notes and amortization schedules
- Searchable online user guide and Help Center offers 24-hour support
- Cash Balance Administration Options
- Customize the content of most reports
- Customize styles of reports and statements
- QNEC Calculation for correcting ADP/ACP test failures
- Aggregation of plans for testing
- Calculate Required Minimum Distributions
- Global RMD Calculation
- Integration with the 5500, 8955-SSA, and 1099 software
- Securely transfer census and annual questionnaire via ftwPortal Pro (additional fees apply)
- Edit census and questionnaire online via ftwPortal Pro (additional fees apply)
- Our PensionPro partnership allows the status of your compliance work to flow seamlessly into PensionPro's Workflow software for greater control and efficiencies.

Annual Tests Provided

(Listed by Internal Revenue Code Section Number)

- 401(a)(4)**—General Test/Cross Test
- 402(g)**—Elective Deferral Limitation
- 401(k)/(m)**—ADP and ACP Nondiscrimination Testing
- 410(b)**—Ratio Percentage and Average Benefits Coverage Testing
- 414(q)**—Highly Compensated Employee Determination
- 414(s)**—Nondiscriminatory Compensation Testing
- 415(c)**—Annual Additions Limitation Testing
- 416**—Top-Heavy Rules
- 414(v)**—Catch-Up Contribution Processing
- 404**—Contribution Limit

Coming Soon! **Distribution Module and Report Writer**

Visit ftwilliam.com or call 1-800-596-0714 to learn more.