ftwilliam.com Software: Welfare Plan Documents

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.

Recently enhanced, the Welfare Plan Documents module helps you effectively administer your plan documents.

Welfare Plan Documents

- Cafeteria Plan — Basic Plan Document, Adoption Agreement or IDP (Individually Designed Plan)
- Premium Only Plan (POP) — Basic Plan Document and Adoption Agreement
- WRAP Plan Document
- HRA Plan Document
- Transit Plan
- Qualified Small Employer HRA (QSEHRA)
- ACA policy

Software Highlights

- Compliance with all DOL, ERISA, and ACA regulations.
- No additional cost for updates and amendments.
- No additional costs for generation of supporting materials, summary plan descriptions, corporate resolutions, and participant forms.
- Extensive error checking and context-sensitive help buttons.
- Batch amendment capabilities (with annual subscription).
- ftwPro Amend for Welfare Plans — Track changes to your document and automatically create a customized consent, SMM and amendment.

Visit ftwilliam.com or call 1-800-596-0714 to learn more.
New! Extensive Enhancements and Features

Basic Plan Document
• Each benefit is in its own Article with each benefit addressing eligibility, enrollment, limitation, administration, and termination of employment.

Cafeteria Plan
• New IDP version of Cafeteria Plan.

• Health FSAs and Limited FSAs, as well as Dependent Care Assistance Accounts and Adoption Assistance FSAs, are separated to provide greater flexibility and customization of benefits, matching contributions, and non-elective contributions within the plan.

• Options for Flex Credits and Purchase/Sale of PTO.

WRAP
• Interface allows you to link ftwilliam.com welfare plans to WRAP document and allows for the ability to edit check all linked documents simultaneously.

• Option within the WRAP SPD to link plans appended to the WRAP SPD.

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