When you have to be right

ftwilliam.com Software:
Retirement 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.

The Retirement Plan Documents module helps you streamline your entire plan document preparation process.

**IRS-Approved Documents**

**Prototype—Non-Standardized**
- Non-Standardized 401(k) Profit Sharing *(Answers only)*
- Non-standardized 401(k)/Profit Sharing
- Non-standardized Money Purchase
- Non-standardized Target Benefit

**Prototype—Standardized**
- Standardized 401(k)/Profit Sharing *(Answers only)*
- Standardized 401(k)/Profit Sharing
- Standardized Money Purchase

**Volume Submitter**
- Volume Submitter 401(k)
- Volume Submitter 401(k) Profit Sharing
- Volume Submitter Money Purchase
- Volume Submitter Governmental Profit Sharing

**Software Highlights**

- Over 30 SPDs, other documents, and participant forms at no extra cost.
- Updates and amendments are provided at no extra cost for subscription document customers.
- Ensure accuracy with extensive error checking and context-sensitive help buttons.
- Save time by batch printing amendments and annual notices with the click of a button.
- ftwPro Amend—Track changes to your document and automatically create a customized consent, SMM, and amendment *(Prototype plans only)*.
- Free data conversion from your existing plan management system.
- E-signatures available with purchase of ftwPortal Pro.
- Quick Entry Screen – tabular checklist editing for quicker data entry.
- Customized Edit Checking – Create additional, customized validations for your plans.
- GUST and EGTRRA documents available for correction program utilization.

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

1Adoption Agreement and Basic Plan Document
2May be established as 401(k) Plan or a Profit Sharing Plan only

Please note that all of the volume submitters and prototype non-standardized profit sharing/401(k) plans offer a new comparability and age-weighted allocation option.
Spanish Forms Package Available

The **Spanish Forms Package** is an add-on to a subscription of ftwilliam.com’s retirement documents. The **Spanish Forms Package** includes translated Spanish versions of PPA defined contribution plan notices including: Summary Plan Descriptions, Annual Notices, and Participant Highlights.

For subscribers that add on the **Spanish Forms Package** the corresponding Spanish notices will generate under the English versions. All instructional text on completing the notices has been left in English.

The **Spanish Forms Package** includes the following notices:

- Spanish SPD
- SPD - English Including Spanish Foreign Language Requirement*
- Annual Notices – Safe Harbor, Auto-Enroll, SIMPLE, and QDIA
- SMMs associated with both mandatory and optional amendments
- Participant Highlights
- Special Tax Notice
- 204(h) Notice
- Blackout Notice
- Publicly Traded Stock Notice
- ESOP Diversification Notice and Election

*Since providing the Spanish version of the SPD does not fulfill the Department of Labor’s foreign language requirement for employers with Spanish speakers, our Spanish Forms package also includes a version of the English SPD that includes the statement (in Spanish) necessary to satisfy the ERISA foreign language requirement for Spanish speakers.

**Please contact your ftwilliam.com sales consultant at 1-800-596-0714 if you are interested in learning more about this package.**