

ftwilliam.com Productivity & Automation Tools

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Agenda

- Why are we different?
- Plan Document Software Tools
- Government Forms Software Tools
- Admin Software Tools
- Portal Software Tools

Why we are different...

- Innovative
 - Batch tools
 - Uploads
 - Conversion
 - E-signatures
 - Workflow
- Integrated
 - Same data schemas
 - No one else can integrate like we can
- Intuitive
 - Customer perspective
 - New UI
 - Client perspective
- We listen
 - Advisory Committees
 - Beta Testers
 - Regular Customer Service Surveys
 - Customer Support like no other!

General

- Conversion tools
 - 55Autofill
 - Document conversions
- ftwLink
- Portal Delivery

Plan Document Software

- ftwPro Amend
- Batch Amend
- Batch Annual Notice
- Show History
- Extract plan information by checklist
- Batch Restatement
- E-Signatures
- Convert Plan to a Different Type
- Customization and format options

Form 5500 & 1099 Software

- 5500 Software
 - Batch 5558, SAR and AFN
 - Batch Invite
 - Workflow Grid
 - Web-portal
 - Import/Export Options
 - Batch 8955-SSA/Fulfillment
- 1099 Software
 - Service Bureau
 - Batch printing
 - Import/Export options

Administration Software

- Administration Software
 - Web-portal/Online Annual Questionnaire
 - Client Package
 - Loan Module
 - Workflow
 - Asset Custodial Uploads

ftwPortal Pro Software

- Send any document from any system to the web-portal
- Collect e-signatures on any document or an ftwilliam.com document
- Send mass communication with our batch document tool
- Secure messaging
- Batch delivery of annual notices, annual questionnaire, annual census, required amendments and PPA restatements
- Download History grid
- Reminders
- Online annual questionnaire



ftwClient Manager

- Project and task templates for easy set up
- Portal users flow into CRM so you only have to maintain one database.
- Integration/completion links
- QC steps/dependencies
- Filters/reporting

Questions?

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Continuing Education

Please – before you leave:

1. Sign in

- Verify your attendance
- Check the box if you want your attendance reported to IRS (for ERPA reporting and those with a PTIN only)

2. Pick up your certificate of attendance

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