

ftwilliam.com – What’s Coming...

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New User Interface

- New User Interface
 - Better filters
 - Direct links
 - New tool bar
 - Bread crumb trail

Document Software

- New format
- New customization
- Answers only
- Batch Restatement
- E-Signatures for Restatement
- New data entry screen
- Quick Entry

ftwClient Manager & Proposal

- ftwClient Manager
 - Filters
 - Completion links
 - Project templates
 - Quickbooks integration
- Proposal Software
 - Document & Admin Integration
 - Autosolve

Continuing Education

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- 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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