

# ftwilliam.com's Plan Document Software

## Webinar Agenda

November 2, 2010

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1. Basic website structure
  - a. Log-in
  - b. Select Company (technical updates and upload features)
  - c. Select Plan (basic company information -- a company can have multiple plans)
  - d. Edit/Print Menu (document checklists, show history)
  - e. Documents/5500/admin/IRS Forms/1009 (Click "Go" from Edit/Print Menu to access)
2. Adding companies/plans
  - a. 55Autofill
  - b. Uploads
3. Cloning and defaults
  - a. On 'Select Company' page, choose 'ZZZ - Default Plans' to set up defaults
  - b. On ' Edit/Print Menu page, options to convert and clone plans
4. Admin menu features
  - a. Blank adoption agreements, checklists and IRS approval letters
  - b. Compliance lists (reports of Safe Harbor Plans, List of Cross Tested Plans, Hardship Plans, 401(k) Plans - Roth, PPA Provisions, Plans with Auto Enrollment, and more!)
  - c. Deleted plans
  - d. Select document print settings (font size and type, line spacing for documents, SDPs and forms)
  - e. Download all plan checklist information (full reports), download all plans on system
  - f. Edit users and company profile
5. Working through checklists (edit checks, section J)
  - a. Edit checks
  - b. Help buttons
  - c. Remember to click 'Update'
  - d. Print out online checklist from bottom-right of the Edit/Print Menu page
  - e. Section J options are NOT used in the plan document(s) - only for SPD and/or forms
  - f. Show history - every single checklist modification and user is recorded (5500 information will also appear here)

6. Generating plans ('Print Plan Documents / Admin Forms' page)
  - a. Group printing options; click on the links/document name to generate one at a time
  - b. Any required amendments shown are already incorporated into the documents (should appear at the end of the Adoption Agreement/Plan Document); optional amendments (like sample amendments to cease safe harbor) are not
  - c. Forms have more information linked under the "I" link to the right of each name
  
7. ftwPro Amend feature
  - a. Currently provided free of charge, completely automated
  - b. First update the checklist, go to the 'Print Plan Documents / Admin Forms' page, click on 'ftwPro Amend (Beta)', select the changes to include in the Amendment and include an effective date and generate the amendment.
  
8. Batch annual notice
  - a. Annual notice includes all annual notice information in one notice (safe harbor, QACA, EACA, QDIA or automatic enrollment)
  - b. Click on 'Batch' next to the 'Annual Notice' from the 'Print Plan Documents / Admin Forms' page for a plan with an annual notice feature (safe harbor, QACA, EACA, QDIA or automatic enrollment)
  - c. Select notices by year-end (select month '12' and year '2011' for 1/1/2011 notices)
  - d. Click on link 'Edit Cover Letter/Email Options' to edit cover letter if using a cover letter.
  - e. 'Generate' button applies to Select List to print, Print All Documents and Print Selected Documents
  - f. Select 'List Affected Plans' and click 'generate' to get an excel download showing what plans will have notices generated and annual notice feature details (whether the plan is safe harbor, has a QDIA, etc)
  - g. Try out the different options and see what works for you.
  
9. Batch PPACA Amendment (see 9/24/2010 Technical update for detailed information)
10.
  - a. Under the "Other Documents" box for a Cafeteria, Wrap or HRA, you should see a link for the "PPACA Amendment" and a link for "Batch" to the right.
  - b. The PPACA batch Amendment includes a data entry grid feature to enable you to review and update the relevant checklist answers (related to PPACA) for your HRA, Cafeteria and Welfare plans in one step.
  
11. Converting DB GUST to EGTRRA - batch mode or one plan at a time (see 5/13/2010 Technical update for detailed information)
  - a. One plan: From "Edit/Print Menu" page for a GUST defined benefit plan, select "Upgrade to EGTRRA Version", you will see "Convert Plan" page to confirm

- b. Batch: On the "Edit/Print Menu" page for a GUST defined benefit plan, select "BATCH Upgrade to EGTRRA Version", you will be taken to the "Convert Defined Benefit Documents to EGTRRA" page -- you can select the plans you want to convert to the EGTRRA checklist and view the "Traditional Defined Benefit Plans Already Converted".
12. Coming features
- a. Publishing annual notices and other documents to portal
  - b. Electronic signature via portal?
  - c. Plan Documents workflow?
  - d. User forums?
  - e. What else would you like to see?