Logging In

12/19/2024 11:50 am CST

You will need the company code, username and password you received when you signed up for the ftwilliam.com system.

General ftwilliam.com website features available after log-in:

- Wolters Kluwer Drop-Down Logo. It provides the following options (not all options may appear depending on your subscription with ftwilliam.com):
  - Home
  - Edit Profile
  - Company/Plan
    - Add Company
    - Edit Company
    - Delete Company
    - Add Plan
    - Edit Plan
    - Delete Plan
    - Plan Search
    - Upload Company/Plan Data
  - Batches
    - ACA
    - 5500 Batch/Workflow
    - 1099
    - DocPrint
    - PPA Restatement
    - 403(b) PPA Restatement
    - Batch Annual Notice
    - Batch Annual Notice (Archive)
    - Batch 2017 RAL Amendment
    - Batch Hardship Amendment
    - Welfare Restatement
    - Batch CARES Act Amendment
    - Batch Claims Amendment
    - DC Compliance Batch Run All Tests
    - Online Annual Questionnaire
    - Annual Questionnaire

    - Census Worksheet
    - Portal Documents
- Distribution Tracking
    - Global Dashboard
    - Distributions Specifications Upload
    - Status Manager
    - Distribution Count
    - Notifications Manager
    - Push to 1099
- Plan Design Summary
    - Global Dashboard
    - Templates
- ftwPortal Pro
    - Global Dashboard
    - View Users Portal
    - Portal User Manager
    - Portal Document Batch
    - Portal User Edit Grid
    - Upload Portal Users
    - Download History
    - Portal User Help
- Reports
    - Company Data
    - List of Deleted Companies
    - List of Deleted Plans
    - ftwPro Amend History
    - Document Provisions by Checklist [Downloads entire document checklist for a particular plan type into Excel format.]
    - All Plans (Select Provisions) [Download into Excel basic information for all plans on the system (plan name, EIN, etc.)]
    - 5500 Enterprise Report [Download into Excel information for all plans most recent 5500 filing and status]
    - All 5500s (Select Provisions) [Option for current and prior year to download into Excel participant counts, total plan assets and more.]
- Downloads
    - Blank Checklists
    - Blank Adoption Agreements for Prototype-Style Plans
    - IRS Letters for Pre-approved Plans
    - ftwilliam.com Signed Amendments for Pre-approved Plans
    - Print Blank GUST Documents
    - List of Approved Outside Trust Agreements - PPA
    - Plan Limit Table
    - Download Document Schema
    - All Portal User Messages
- Administrative Tasks (Master/Designated Admin Users Only)
    - Portal/Workflow
        - Global Email Settings
        - Edit Module Admins
        - Portal Branding
        - Portal Correspondence

        - Edit Contact Types
        - Edit Document Classifications
        - Edit Folder List
        - View Portal Data Usage
    - Create Custom Checklist Edit Checks
    - Global Document File Names
    - Global Document Print Settings
    - SAR/AFN Print Settings
    - Defaults
        - SAR/AFN/8955-SSA Defaults
        - ZZZ-Defaults
        - Default Online Annual Questionnaire
        - Default Portal Document SplitZip File Format
    - Account Profile [Place for Master Admin User Only to update Company Profile.]
    - Logged in Users
    - Divisions [Place for Master Admin User Only to set-up containers which hold one or more companies (Plan Sponsors).]
    - Users [Set permissions for users, log-in and password information.]
    - View Online Usage Agreement
- Support:
    - Help Center
    - Contact Us
    - Suggestion Box
    - User Guides [Provides access to all user guides for the various modules.]
    - Client Portal Help
    - 5500 FAQs
    - Post PPA Reference Guide
    - Email and Tech Updates
- TAG (Technical Answer Group)
- RTO Benefits
- Logout