

# Edit Plan

12/19/2024 2:29 pm CST

Once users have completed any necessary updates to the "Edit Company" screen, an existing plan may be selected from the dropdown menu below the company name or a new plan may either be added via the "Add Plan" link from within the "Company Menu" box.

Wolters Kluwer

Select a Plan... Go

Select a Plan From History...

Home > Edit Company Help

Company: 1 Example Company ID: CustID123

Plan: 1 Example Company

Details: 1 Example Company Example Company 401(k) Plan

Company Menu

- Delete Company
- Add Plan
- Show History
- Default Company ☐

This will redirect to the "Edit Plan" screen. The "Edit Plan" screen allows users to update the online checklist for plan documents, if applicable as well as access other modules activated on the account.

Users can change the Plan Name in the ftwilliam.com system from the "Edit Plan" screen. In the "Plan Checklist" box, click on "A. General Information". Users can edit the plan name on Lines 2a and 2b. The system automatically updates the checklist once the user clicks out of the fields.

Wolters Kluwer

Select a Plan... Go

Select a Plan From History...

Home > Edit Company > Edit Plan Plan Notes Help

Company: 1 Example Company ID: CustID123

Plan: Example Company 401(k) Plan ID:

Checklist: Non-Standardized 401(k) (Adoption Agreement Format) - POST

Details: EIN: 86-7530932 • PN: 001 • PYE: 12-31

Plan Menu

- Convert Plan
- Clone Plan
- Delete Plan
- Show History
- Document History
- MEP/PEP Options
- Post PPA Reference Guide

Plan Modules

Plan Documents	IRS Forms	5500 Forms	1099-R	Compliance	Portal	Proposal	Plan Design	Distributions
Yes	Yes	2023	2024	Yes	Yes		Yes	No
Example	Example	Example	Example	Example			Example	Example

Plan Checklist - Expand All Applicable / Expand All / Collapse All Print

Edit Check All Status: ⚠

▼ A. GENERAL INFORMATION Edit Check Status: ⚠

▼ A. General

1. Plan Number	001
2a. First line of Plan name	Example Company 401(k) Plan
2b. Second line of Plan name	