

Edit Company

03/11/2026 11:25 am CDT

Follow the steps below to edit company data.

1. Select your company from the Home page that you want to update by clicking on the Company button. This will take you to the Edit Company page.

The screenshot displays a web interface for editing company data. On the left is a sidebar with navigation buttons: 'Add Company', 'Add Plan', 'Batches / Workflow', 'ftwPortal Pro', and 'Upload Company/Plan Data'. Below these is an 'Updates: (View All)' section with a 'DB Compliance' button. The main area is titled 'Plan Search' and contains two input fields: 'Company: sample' and 'Plan: Name or ID ...'. There are 'Clear All Filters' and 'Advanced' buttons. Below the search area is a 'Search Results' section. It shows a table with one row for 'Sample Company 401(k) - ID Format' (ID: 555JT). The row has a 'Plan' dropdown menu and an 'Edit Plan' button. Below the row are several filter buttons: 'Company' (highlighted with a red box), 'Documents', 'IRS', '5500', '1099', 'ACA', 'Compliance', 'Portal', 'Proposal', 'Distributions', and 'PDS'.

2. By default, the list will display all relevant sections of the checklist; fields which are not applicable based on other answers will not be displayed, and in their place, you will see a "+" sign to expand the section.

Note: For more information on each item, you can hover your cursor over the "?" icon next to see a brief summary or click on the "?" to read a longer description.

3. Run edit checks to ensure your updates meet all requirements.

Company Data - [Expand All Applicable](#) / [Expand All](#) / [Collapse All](#) Company Edit Check Status: 

▼ Company Information:	
1. Name of adopting employer (Plan Sponsor):	 Sample Company
2a. Plan Sponsor address line 1:	
2b. Plan Sponsor address line 2:	
3. Plan Sponsor city:	
4. Plan Sponsor state:	
5. Plan Sponsor zip:	
6. Plan Sponsor phone AC/Number:	 -
7. Plan Sponsor fax AC/Number:	 -
▼ Additional Company Information:	
8. Plan Sponsor EIN:	
9a. Plan Sponsor fiscal year end (MM/DD):	 <input type="text"/>
9b. If the Plan Sponsor fiscal year end is not a simple date, enter the full Plan Sponsor fiscal year here. This field will override the previous field in all generated documents.	
10a. Plan Sponsor entity type:	 C Corporation <input type="text"/>
	
	
	
11. State of organization of Plan Sponsor:	
12a. The Plan Sponsor is a member of an affiliated service group:	 <input type="radio"/> Yes / <input checked="" type="radio"/> No
	
13a. The Plan Sponsor is a member of a controlled group:	 <input type="radio"/> Yes / <input checked="" type="radio"/> No
	

NOTE: When updating company data, you can choose to update future and unlocked 5500s, 8955-SSAs, PBGC and 1099s if you also subscribe to those other modules. To update those forms, click the box next to the applicable form, select the applicable year and click the "Update" button.

4. Checking these boxes will transfer the updates made to active forms and schedules in the year chosen and future years.

<input checked="" type="checkbox"/>	Update future and unlocked	<input type="text" value="2025"/>	5500s, 8955-SSAs, and PBGCs with any company info changes. ??
<input checked="" type="checkbox"/>	Update future and unlocked	<input type="text" value="2025"/>	1099s with any company info changes. ??
<input type="button" value="Update"/> 			

5. Once you have added your company, you can add a new plan via the "Add Plan" link under the Company Menu.

Home > Edit Company [Company Notes](#) [Help](#)

Company:	<input type="text" value="Sample Company"/>	ID: 
Plan:	<input type="text" value="Select a plan..."/>	
Details:	EIN: 99-9999999 	

Company Menu

- [Delete Company](#)
- [Add Plan](#)
- [Show History](#)
- Default Company

6. Enter the Plan Name and select your desired checklist type from the list.

Home > Edit Company > Add Plan

Enter the Plan name:

Company: Sample Company

Plan Line 1: Sample Company 401(k) Plan

Plan Line 2:

Responsible for Plan:* Yes

* If you are responsible for maintaining the Plan Document enter "Yes". If someone else is responsible for the Plan Document (e.g., you are responsible for Plan Administration only), enter "No".

Select a Checklist:

Defined Contribution:

- Employee Stock Ownership Plan w/ 401(k) - **POST**
- Governmental Money Purchase - **POST**
- Governmental Profit Sharing - **POST**
- Non-Standardized 401(k) (Adoption Agreement Format) - **POST**
- Non-Standardized 401(k) (Adoption Agreement Format) - **POST** (Answers Only)
- Non-Standardized 401(k) (Individually Designed Format) - **POST**
- Non-Standardized Money Purchase - **POST**
- Non-Standardized Target Benefit - **POST** * Not offered starting with Cycle 4
- Standardized 401(k) (Adoption Agreement Format) - **POST**

7. You can select a plan to pull default values from. If you do not have Default Plans set up on your account, your only option will be ZZZ Default. What you have selected in your ZZZ-Default checklist for the selected plan type will populate in your added plan. Click on the "Add Plan" button at the bottom of the page.

Select a plan to pull default values from:

Default: Standard ZZZ Default

Standard ZZZ Default

Add Plan

Default 401(k) Non-Std Plan - PT Format - Post PPA

Default Company 401(k) Safe Harbor Plan - POST