Checklist Type

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All plans on *ftwilliam.com* are associated with a checklist type of one of the following depending on the document packages you have purchased.

- Retirement Plan Documents:
  - Prototype Non-Standard 401(k) - PPA
  - Prototype Non-Standard 401(k) (Answers Only) - PPA
  - Prototype Non-Standardized Money Purchase
  - Prototype Non-Standardized Target Benefit
  - Prototype Standardized 401(k) - PPA
  - Prototype Standardized 401(k) (Answers Only) - PPA
  - Prototype Standardized Money Purchase
  - Volume Submitter 401(k) Prototype Format - PPA
  - Volume Submitter 401(k) Prototype Format (Answers Only)- PPA
  - Volume Submitter 401(k) - PPA
  - Volume Submitter Profit Sharing - PPA
  - Volume Submitter Money Purchase
  - Defined Benefit Pension Plan (Proto Format)
  - Defined Benefit Pension Plan (ID Format)
  - Cash Balance Plan (Proto Format)
  - Cash Balance Plan (ID Format)
  - Employee Stock Ownership Plan
  - Employee Stock Ownership Plan 401(k)
  - Section 403(b) Plan (Full Scope)
  - Section 403(b) Plan (Limited Scope)
- Welfare Plan Documents:
  - Cafeteria Plan
  - Premium Only Plan
  - Health Reimbursement Arrangement
  - Trans Spend Acct
  - Wrap Plan
- Non-Qualified Plan Documents:
  - Section 457(b) Plan
  - Section 409A Plan
- Misc (1099, 5500 or Admin Software)

Note: If you have not purchased a plan document module you will only have access to the 'Misc' plan checklist type. Plans using the Misc. checklist have access to the General Information section on the Edit Plan screen. Plans using the Misc. checklist can still be used for all modules except the Plan Documents module.