

Amendments

08/16/2024 3:50 pm CDT

There are several types of amendments available on the system. All Amendments are located within the 'Documents/Forms' box on the 'Print Plan Documents' page for a plan.

- **Sample amendment template.** In the 'Documents/Forms' box, the link to 'Amendment' will generate a sample Amendment template that can be used to create amendments to existing documents. For pre-approved documents, we generally recommend copying and pasting the language from an existing adoption agreement/document into the amendment template to help ensure you do not modify the pre-approved language. This is an option for users that do not subscribe to the automated amendment, ftwPro Amend feature.
 - **Optional amendments.** Some Amendments may be provided in case you should find them useful (termination amendments, amendments to add/remove optional features). Some examples of optional amendments include: Cease Safe Harbor Match Amendment, DBK Amendment, Roth Amendment (for 457(b) documents), etc.
 - **Required Amendments.** Required amendments are typically named "20XX Required Amendment". When required amendments are released, updated plan documents are released at the same time. Pre-approved documents will typically include required amendments as a tack-on amendment. Individually designed documents will typically have the changes incorporated into the document. This means that if new documents are generated as part of a restatement for example, you do not need to separately create any required amendments
 - **ftwPro Amend.** Automatically generate a plan amendment, summary of material modifications (SMM) and consent action for any retirement or welfare plan in prototype format (plan with an Adoption Agreement). This amendment feature creates totally customized amendments based on revisions you have made to checklist answers. Note: Answers Only document versions will generate the amendment as if it were a full version document type so that all changes made in the checklist are displayed, including blank or inactive options. Note: The ftwPro Amend feature is an add-on to the documents in prototype format. If you would like to learn more, please contact support@ftwilliam.com or call 800-596-0714.
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