Part 1: Getting Started

08/19/2025 2:06 pm CDT

1.1. Logging In

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

DI.	ease log in
P1	ease log III
Company Code:	
Username:	
Password:	
	Save password
1	📥 Log In

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

Getting Help: At the top of every page you will find a drop-down menu under the Wolters Kluwer logo for Support options. You can call us during regular business hours at (800) 596-0714 (Central Time). This number can also be found by clicking the "Contact Us" link at the bottom of every page in your account.

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Product user guides are available from the Wolters Kluwer button > Support > User Guides.

6). Wolters Kluwer -	Select a Plan		× [
		Select a Plan From	History	*
	Home			
8	Edit Profile	lan Search		
4	Company / Plan Batches Distribution Tracking Plan Design Summary ftwPortal Pro Reports Downloads Administrative Tasks Support	Company: Name or ID Plan: Name or ID dvanced Options EIN: Plan Number: Plan Type: Plan Year End: Show Non-men Help Center		MEF 5500 A Document A Compliance A
	TAG (Technical Answer Group) RTO Benefits	Contact Us Suggestion Box		
6	Log Out	User Guides 🔹 🕨	- Serece Hady Serece Companies and Flans	
		Client Portal Guide 5500 FAQs Document Reference Guides • Email and Tech Updates	Portal	
			IRS Forms 1099s DC Compliance DC Compliance Quick Start Guide Distributions DB Compliance User Guide DB/Combo Proposal User Guide	

1.2. Select/Add New Company and/or Plan

First time ftwilliam.com users may need to add a company and plan to get started. Click here to review instructions to Select/Add/Delete Companies and Plans.

🔕 Wolters Kluwer	▼ Select a Plan ▼ Go ▼	💮 User Name 🔻
Home		
Add Company	Plan Search	
Add Plan	Company:	
Batches / Workflow 🔻	Plan: ftw	
ftwPortal Pro 🔻		Clear All Filters Advanced
Upload Plan Data	Search Results	
Updates: (View All)	Pen FTW 401k Demo Plan FTW Demo Company Plan Documents IRS Forms 5500 1099 Admin Portal Proposal Checklist	Edit Plan

1.3. Select Plan and Navigate to the Compliance Module

After locating the Plan, click on the name of the plan. A list of available modules will appear under the plan name. To access the Compliance Software, click the "Compliance" button under the plan name.

🕄 Wolters Kluwer	Select a Plan	So 💌 Workflow 💌 🔮 User Name 💌				
Hanne						
Add Company	dd Company Plan Search					
Add Plan Company: Mame or ID Plan: ftw 401						
Batches / Workflow 👻	Clear All Filters Advanced					
ftwPortal Pro 🔻						
Upload Company/Plan Data	Search Results					
Updates: (View All) Wait and See (Maybe) Safe	FTW 401k Demo Plan FTW Demo Company Edit Company I Plan Documents IRS Forms 5500 1099 Compliance	Edit Plan 💌				