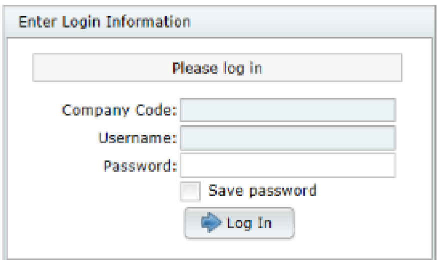
Part 1: Getting Started

08/19/2025 2:06 pm CDT

1.1. Logging In

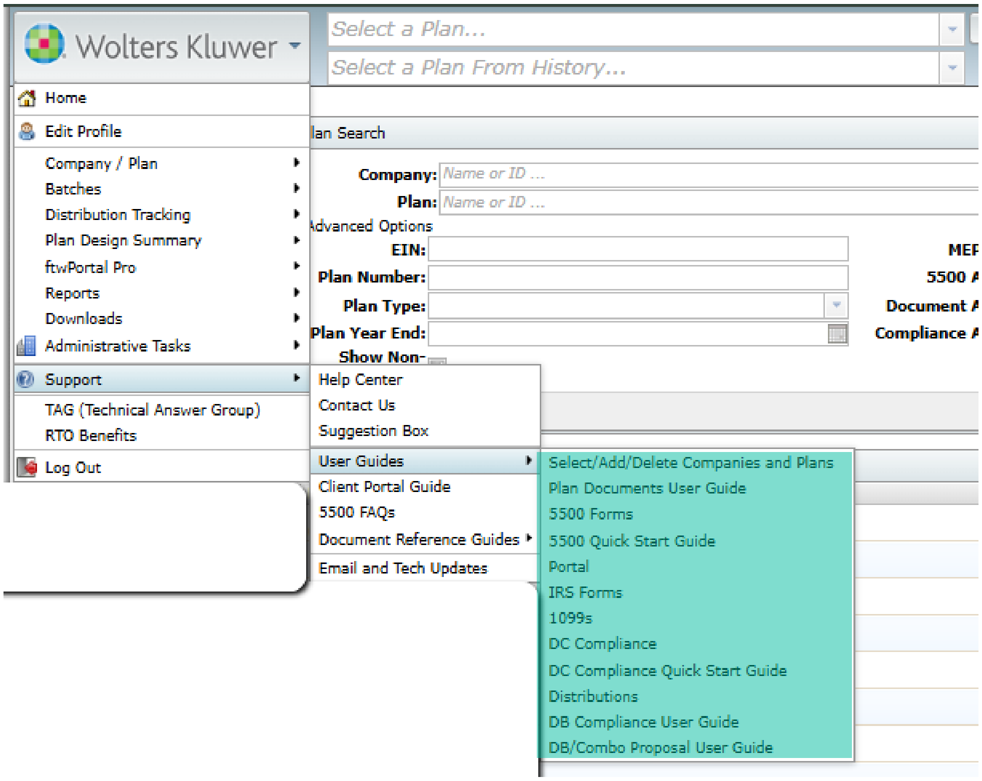
You will need your company code, login name and password you received when you signed up for the ftwilliam.com system.



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

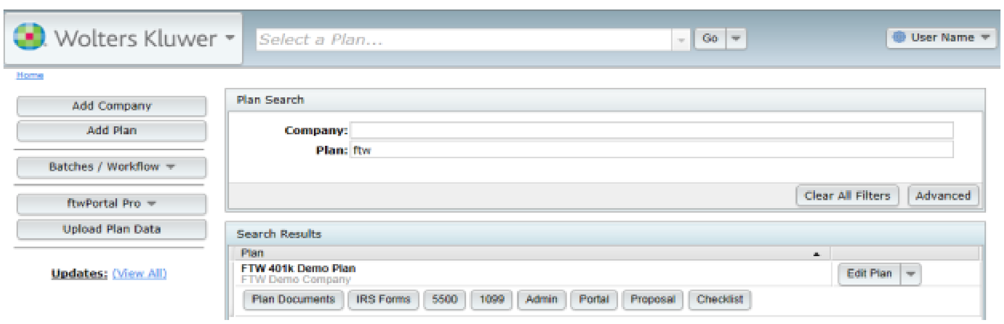
Getting Help: At the top of every page you will find a drop-down menu under the Wolters Kluwer logo for Support options. You can call us during regular business hours at (800) 596-0714 (Central Time). This number can also be found by clicking the “Contact Us” link at the bottom of every page in your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

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



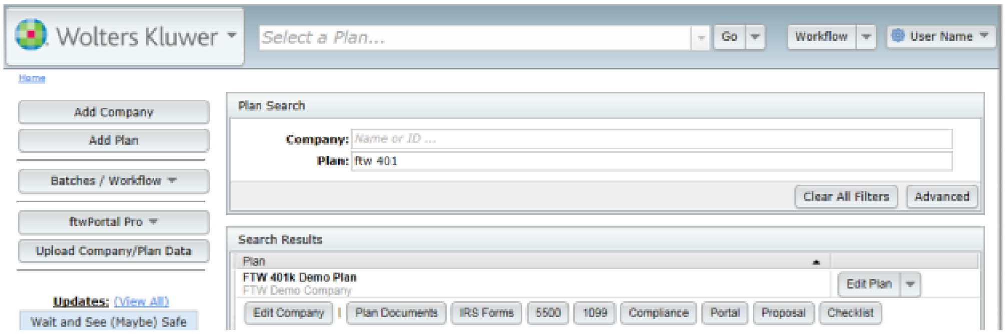
1.2. Select/Add New Company and/or Plan

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.



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...
Go
Workflow
User Name
Home
Add Company
Add Plan
Batches / Workflow
ftwPortal Pro
Upload Company/Plan Data
Updates: (View All)
Wait and See (Maybe) Safe
Plan Search
Company:
Name or ID ...
Plan:
ftw 401
Clear All Filters
Advanced
Search Results
Plan
FTW 401k Demo Plan
FTW Demo Company
Edit Plan
Edit Company
Plan Documents
IRS Forms
5500
1099
Compliance
Portal
Proposal
Checklist