1.3. Select Plan and Navigate to the Compliance Module

10/29/2024 1:42 pm CDT

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 ▼ 1	Workflow 👻 🔮 User Name
forme		
Add Company	Plan Search	
Add Plan	Company: Name or ID	
	Plan: ftw 401	
Batches / Workflow 👻		Clear All Filters Advanced
ftwPortal Pro 🔻	· · · · · · · · · · · · · · · · · · ·	
Upload Company/Plan Data	Search Results	
	FTW 401k Demo Plan	Edit Plan
Updates: (View All)	Fill Company Plan Documents IRS Forms 5500 1099 Compliance Portal Propos	al Checklist
Wait and See (Maybe) Safe		