

FTW Step 2: Establish the Conversion Year & Date

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- Select the applicable plan.
 - Click the 'Compliance' button to get to the DB Compliance home page.
 - Note that if you are **not** subscribed to the ftw Plan Document module, you will also need to select Cash Balance or Defined Benefit when prompted to get to the home page.
 - Create the "Conversion Year" - Add new Year End for the "Conversion Year" based on the following:
 - For an existing plan – This will be the year-end prior to the year you want to replicate liabilities (per Rev Proc 2017-56) from your current system.
 - For a startup plan, this will be the year-end prior to the start of the first plan year.
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