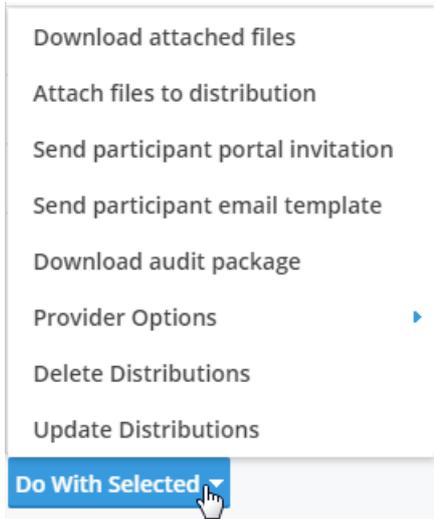


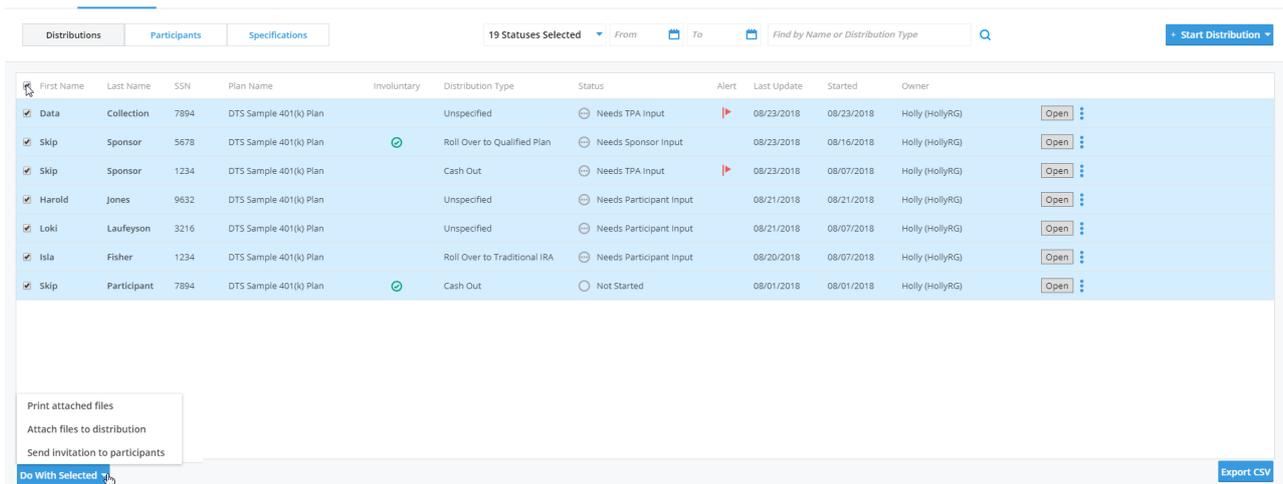
Attach files to distribution

12/05/2024 7:57 am CST



The “Do With Selected” tool can be used to batch generates documents you created via the “Document Template Editor” along with forms provided by default from the ftwilliam.com Plan Document software. These forms are provided even if you do not subscribe to our Document Software Module.

The first step in the process is to select which participants you would like to create documents for. This can be done by selecting the checkbox on the left side of the grid next to your participant’s name. If you would like to create documents for all participants at once, you may use the top checkbox located next to “First Name” on the grid. Once your participants are selected, click the “Do with Selected” option in the bottom left corner of the grid for options.



The next step in the process is to choose which files you would like to batch create. You do this by first clicking “Attach files to distribution”. This will automatically attach all of the selected files to the distribution record. Rather than saving the files to your computer, everything is conveniently stored in the distribution record for your reference and can be re-printed at a later date.

Once the “Choose files to attach to record” box appears, simply check the box next to the forms and document

templates you would like to include. Remember, if you inserted placeholders in your templates during set-up, those placeholders will automatically pull in the appropriate participant data into your documents for saving and printing. After you've made your selection, click "Attach" and the software will produce a confirmation letting you know when the process is completed.

Choose files to attach to record ✕

Document Module	Document Templates
<input type="checkbox"/> Special Tax Notice	<input type="checkbox"/> QJSA Notice
<input type="checkbox"/> Distribution Form QJSA	<input type="checkbox"/> Default - QJSA/Spousal Consent with Notary
<input type="checkbox"/> Distribution Form Non-QJSA	<input type="checkbox"/> Default Cover Letter For Sponsor Sign and send on to participant
<input type="checkbox"/> Benefit Statement	<input type="checkbox"/> Default Force-out Under \$1,000 with RK Fee
<input type="checkbox"/> QDRO Procedures	<input type="checkbox"/> Default Distribution Notice Account Balance Exceeds Force-out Amount
<input type="checkbox"/> Inservice Distribution Form	<input type="checkbox"/> Default Sample Trustee Authorization
<input type="checkbox"/> Beneficiary Dist Election Form	<input type="checkbox"/> Default Force-out with auto-rollover and RK Fee
<input type="checkbox"/> Beneficiary Designation	<input type="checkbox"/> Default Sample Provider Directive For Rollover
	<input type="checkbox"/> Testing all placeholders

Cancel Attach

Saving Documents...

14%
1 / 7

OK