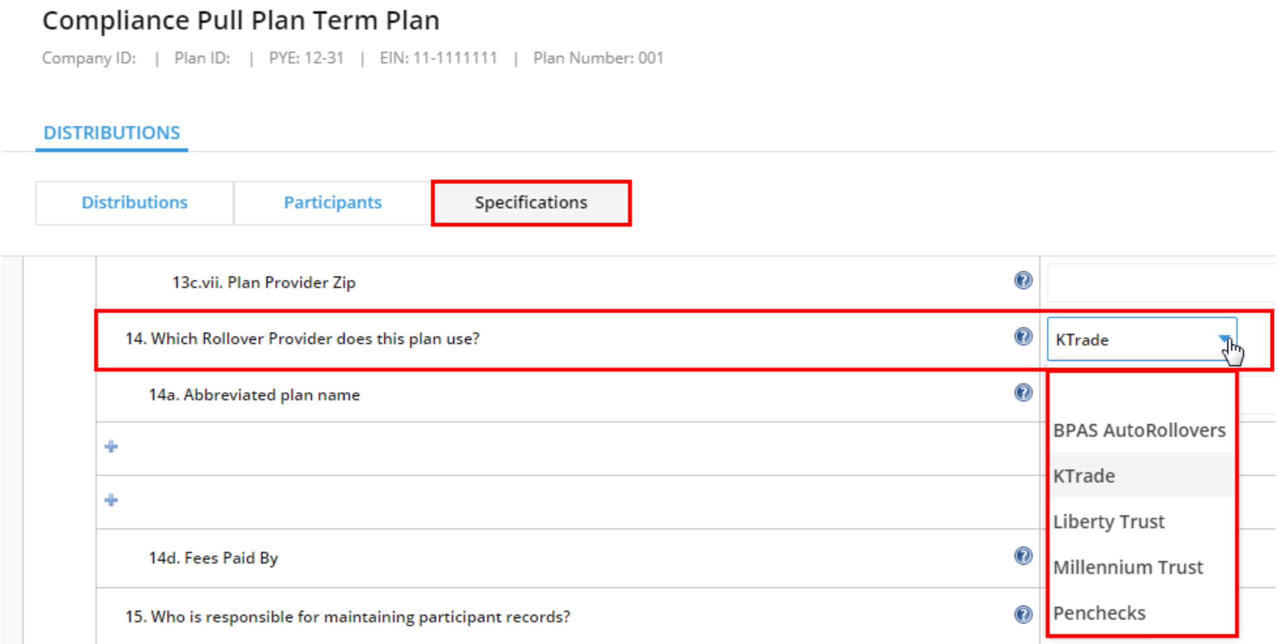
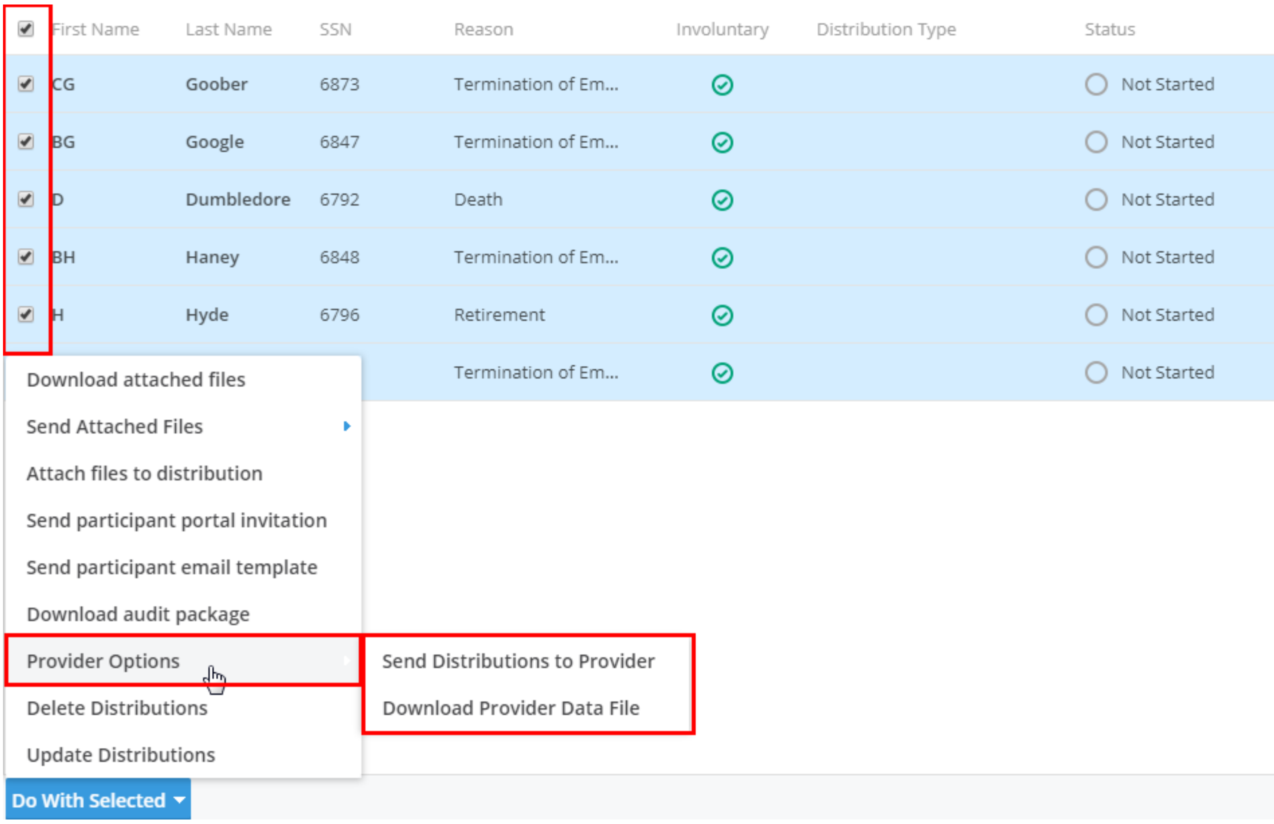
# Provider Options

12/05/2024 8:18 am CST

ftwilliam.com has integration with the following Rollover Providers:




In the DTS specifications for your plan, you can indicate which Rollover Provider the plan uses. Once you've collected data for all of your distribution records, simply select the records you want to send by clicking on the checkboxes next to the distribution record on the plan menu.



Once your records are selected, click on the “Do With Selected” option and choose “Provider Options” from the menu. From there, you have the option to automatically “Send Distributions to Provider” or “Download Provider Data File”. When you send the file for the provider, ftwilliam.com sends all the data necessary to set-up the rollover account on your behalf. You will not need to prepare a spreadsheet, log into the provider’s portal and upload the information separately.