

# Provider Options

12/05/2024 8:18 am CST

ftwilliam.com has integration with the following Rollover Providers:

## Compliance Pull Plan Term Plan

Company ID: | Plan ID: | PYE: 12-31 | EIN: 11-1111111 | Plan Number: 001

### DISTRIBUTIONS

- Distributions
- Participants
- Specifications**

|   |                                     |
|---|-------------------------------------|
| 13c.vii. Plan Provider Zip                                  | <input type="text"/>                |
| 14. Which Rollover Provider does this plan use?             | <input type="text" value="KTrade"/> |
| 14a. Abbreviated plan name                                  | <input type="text"/>                |
| + <input type="text"/>                                      |                                     |
| + <input type="text"/>                                      |                                     |
| 14d. Fees Paid By   | <input type="text"/>                |
| 15. Who is responsible for maintaining participant records? | <input type="text"/>                |

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.

| <input checked="" type="checkbox"/> | First Name | Last Name  | SSN  | Reason               | Involuntary                         | Distribution Type | Status                            |
|-------------------------------------|------------|------------|------|----------------------|-------------------------------------|-------------------|-----------------------------------|
| <input checked="" type="checkbox"/> | CG         | Goober     | 6873 | Termination of Em... | <input checked="" type="checkbox"/> |                   | <input type="radio"/> Not Started |
| <input checked="" type="checkbox"/> | BG         | Google     | 6847 | Termination of Em... | <input checked="" type="checkbox"/> |                   | <input type="radio"/> Not Started |
| <input checked="" type="checkbox"/> | D          | Dumbledore | 6792 | Death                | <input checked="" type="checkbox"/> |                   | <input type="radio"/> Not Started |
| <input checked="" type="checkbox"/> | BH         | Haney      | 6848 | Termination of Em... | <input checked="" type="checkbox"/> |                   | <input type="radio"/> Not Started |
| <input checked="" type="checkbox"/> | H          | Hyde       | 6796 | Retirement           | <input checked="" type="checkbox"/> |                   | <input type="radio"/> Not Started |
| <input type="checkbox"/>            |            |            |      | Termination of Em... | <input checked="" type="checkbox"/> |                   | <input type="radio"/> Not Started |

- Download attached files
- Send Attached Files
- Attach files to distribution
- Send participant portal invitation
- Send participant email template
- Download audit package
- Provider Options**
- Delete Distributions
- Update Distributions

- Send Distributions to Provider
- Download Provider Data File

Do With Selected

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.

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