

Overview of ftw Proposal Pro

12/11/2024 8:36 am CST

Participant data, calculations and reports are located at the top of the screen. Calculations will be based upon the plan information and specifications that are entered lower on the page. You must first set up your proposal specifications (in the large box titled 'Proposal Specifications') for as many options as you have selected under the "General Information" box and any applicable new comparability groups must be set up under the bottom box ('Profit Sharing - New Comparability Groups'). Then census information can be collected (at the top of the screen).

The proposals must be recalculated each time participant or plan specification data changes.

Proposal (Beta)

Company: 000 Sample Company

Plan: 000 Sample Company 4k vol sub

We are offering our new proposal system free of charge to select customers. Please send your comments to fwilliamsupport@wolterskluwer.com with subject line "Proposal". After the beta testing period, the proposal module will available at a competitive price.

Participant Data/Calculate/Reports

[Work with Census](#)[Calculate](#)[Print Report](#) | [Print Settings](#)

General Information

Enter overall description of proposal: 000 Sample Company 4k vol sub

Prepared By:

Plan Year End - Year: 2012

Enter number of proposal options: 3

Plan is Top Heavy as of the Determination Date: Yes

Age component of Normal Retirement Age: 65

Enter combined marginal income tax rate: 0.00

[Return](#)

Proposal Specifications

	Proposal 1 Option 1	Proposal 2 Option 2	Proposal 3 Option 3
Enter description of proposal option:	<input type="text"/>	<input type="text"/>	<input type="text"/>
Contribution Sources			
Elective Deferrals:	Yes	Yes	Yes
Safe harbor type:	Yes - SH Nonselective	Yes - SH Nonselective	Yes - SH Nonselective
Matching Contributions:	Yes	Yes	Yes
Profit Sharing Contributions:	Yes	Yes	Yes
Safe Harbor Allocations			
Number of Safe Harbor Matching rates:	1 rate	1 rate	1 rate
Enter rate of Matching Contributions on first tier (without % sign):	0.00	0.00	0.00
Enter maximum amount of Employee Contributions matched on first tier (without % sign):	0.00	0.00	0.00
If two tiers, enter rate of Matching Contributions on second tier (without % sign) if one tier, enter zero:	0.00	0.00	0.00
If two tiers enter maximum amount of Employee Contributions matched on second tier (without % sign):	0.00	0.00	0.00
Nonselective Safe Harbor contributions:	0.00	0.00	0.00
Non Safe Harbor Matching Allocations			
Matching Contribution formula (if SH Match, enter number of added Tiers):	1 rate	1 rate	1 rate
Enter rate of Matching Contributions on first tier:	0.00	0.00	0.00
Enter maximum amount of Employee Contributions matched on first tier:	0.00	0.00	0.00
If two tiers, enter rate of Matching Contributions on second tier:	0.00	0.00	0.00
If two tiers enter maximum amount of Employee Contributions matched on second tier:	0.00	0.00	0.00
Profit Sharing Contribution			
Profit Sharing Formula			
Profit Sharing allocation formula:	Pro rata	Pro rata	Pro rata
Allocation type for types other than New Comparability:	Specified	Specified	Specified
Profit Sharing - Integration			
If "Integrated", integration level for determining Excess Compensation:	TWBS	TWBS	TWBS
If "Integrated", enter fixed percentage or fixed dollar amount (without % or \$ or comma):	0.00	0.00	0.00
Profit Sharing - Allocation Amounts			
If allocation type is "Dollar" enter total dollar:	0.00	0.00	0.00
If allocation type is "Specified" enter percent:	0.00	0.00	0.00
If allocation type is "Specified" and integrated, enter amount of permitted disparity (max 5.7% or other lower applicable rate):	0.00	0.00	0.00

[Return](#)

Profit Sharing - New Comparability Groups

	Proposal 1	Proposal 2	Proposal 3
Group 1:	Percent 0.00	Percent 0.00	Percent 0.00
Group 2:	Percent 0.00	Percent 0.00	Percent 0.00
Group 3:	Percent 0.00	Percent 0.00	Percent 0.00
Group 4:	Percent 0.00	Percent 0.00	Percent 0.00
Group 5:	Percent 0.00	Percent 0.00	Percent 0.00

[Return](#)