2.3. Eligibility, Contribution, Vesting and Distribution

06/26/2025 12:15 pm CDT

- Review plan specifications and make sure they are in line with the plan document

Q.S. Tip: If you use ftwilliam.com plan documents most fields will be populated and you will need only to review and make minor modifications; otherwise code plan specifications according to the plan's provisions.

Q.S. Tip: If you do not use the ftwilliam.com documents you may set up one or more ZZZ default plan documents in our document system to have common plan specifications populated. Designated Admin users and the Master user can edit ZZZ-Defaults by clicking the Wolters Kluwer logo button, selecting Administrative Tasks, then clicking ZZZ-Defaults under Defaults. They can edit the default plan checklists just like other plans. Now when you add a plan with that document type, those default specifications will populate the compliance software.