

# ftwProAmend

03/17/2026 3:02 pm CDT

The ftwPro Amend add-on feature streamlines the process of employer discretionary plan amendments by allowing you to track changes seamlessly. As you make updates to your Plan Checklist, the tool automatically generates a Consent, Amendment, and SMM. This ensures that every discretionary plan amendment is tailored specifically to the edits you have made, saving you time and reducing the risk of errors.

**Note: The Answers Only format will generate the Amendment as if it were a full format so that all changes made in the checklist are displayed, including blank or inactive options. The ID format will only generate a Consent, and SMM.**

Follow the steps below in using the ftwPro Amend feature.

1. Make updates to the Plan Checklist on the Edit Plan page.
2. Run edit checks to ensure your changes meet all requirements.
3. Click on the Plan Documents button to access the print Plan Documents page.

Home > Edit Company > Edit Plan

Plan Menu

- Convert Plan
- Clone Plan
- Delete Plan
- Show History
- Document History
- MEP/PEP Options
- Post PPA Reference Guide
- Archive Plan

Plan Modules

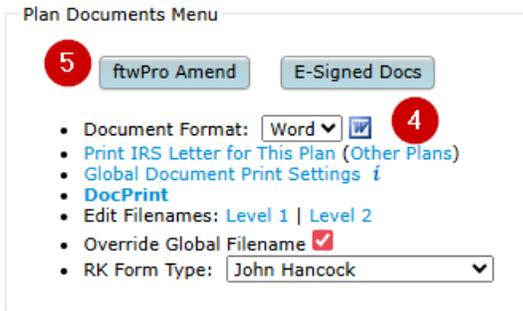
Plan Documents	IRS Forms	5500 Forms	1099-R	Compliance	Portal	Proposal	Plan Design	Distributions
Yes	Yes	2025	2025	Yes	Yes		Yes	Yes

1 Plan Checklist - Expand All Applicable / Expand All / Collapse All

Print

2 Edit Check All Status:

4. Choose the document format under the Plan Document Menu.
5. Click on the ftwPro Amend button under the Plan Documents Menu.



6. On the next page, you will see a list of changes that have been made to the plan over time. The software will automatically select the last date/time change, but you can select more than one date/time change if needed.

7. Enter the effective date of the amendment.

8. Click on the Generate Amendment button. If you subscribe to the Portal, you can publish the amendment to the Portal by clicking on the Publish to Portal button. In addition, you can download your changes as a CSV file.

Company: **Sample Company** Document Format: Word  **7**

Plan: **Sample Company 401(k) Plan** Effective Date: January 1, 202:

Please select the checkbox in the "Select" column to indicate which changes should be incorporated into the amendment and then click the "Generate Amendment" button below.  
**\*\*NOTE: The selected changes must be in consecutive order without gaps.**  
**\*\*NOTE: If publishing to portal for E-Sign, publish as word to insert signatures in prototype style checklist, which will update to pdf after E-Sign.**

Select	Date/Time	Code	Section	Description	Value	Notes
<input type="checkbox"/>	2026-02-02 12:26:44					
<input checked="" type="checkbox"/>	2026-03-09 15:34:06					
		A	15a	Definition of Statutory Compensation:	W-2	Withholding
		A	16a.vii	Other Adjustments:	Yes	No
		A	16b.viii	Other Adjustments:	Yes	No
		A	16c.viii	Other Adjustments:	Yes	No
		C	13a	This is a safe harbor plan exempt from most testing	No	Yes - safe harbor match
		C	13b	Indicate the safe harbors the Plan is intended to satisfy	ADP and ACP - QACA	ADP and ACP
		E	7a	Provide for special vesting provisions	Yes	No
		K	12	The Plan allows modifications to the default LTPT Employee provisions listed in the Standard Provisions.	Yes	No
				For an EACA Plan, indicate which employees will be "covered"	Only those	All Eligible

**6**

**8** Generate Amendment Publish to Portal Download as CSV

**NOTE: If you do not currently subscribe to ftwPro Amend, and would like more information, please contact your sales consultant for how to add ftwPro Amend to your account. Click the link below to locate your sales consultant.**

[Find your ftwilliam.com sales consultant](#)

