ftwilliam.com Defined Benefit Compliance and Proposal Software

Alleviate the business risks inherent in outdated, non-web-based software with ftwilliam.com's 100% cloud-based, modern ***Defined Benefit Compliance (DB Compliance)*** software - a complete proposal, valuation and testing system.

Eliminate the pain point of duplicative manual data entry! Our DB Compliance software is integrated with ftwilliam.com's Defined Contribution Compliance Testing & Reporting, Plan Documents, DB and DC Proposal, and Portal modules.

Advantages of using ftwilliam.com's cloud-based software:

- Secure software accessible from any location –employees can work, and employers can recruit from anywhere
- NO hardware or cloud server installation, infrastructure investment, need for continuous IT support, data storage requirements or costs!
- Unlimited number of concurrent users
- Continuous and automatic software updates – nothing to download or install locally
- No VPN is required to dial in or multiple programs to open
- Easily upload/download data using CSV and Excel files to efficiently move information in and out as needed
- Securely and quickly share data between a TPA and back office actuary
- Eliminates the need to email pdfs or invest in secure file transfer methods
- Innovative functionality and integration across modules will increase your operational efficiencies and improve overall profitability

The first new Defined Benefit Compliance software launched in more than 20 years!

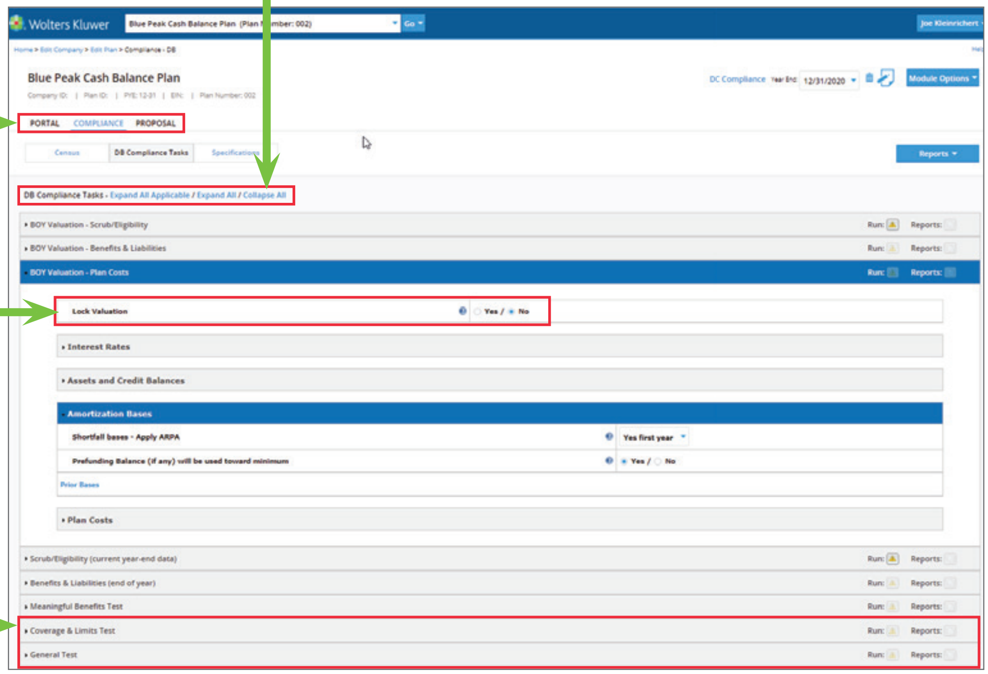
Wolters Kluwer

DB Compliance tasks: Task list to complete a beginning of year valuation and end of year compliance testing

Easy access to other modules: PORTAL- COMPLIANCE - PROPOSAL

Lock valuation: Lock valuation calculations (protect from plan amendments)

Compliance tests: Standalone DB or combo compliance testing with run buttons



Key features include:

- **Plan designs supported:** Cash balance and traditional defined benefit
- **Efficiency features:**
  - Integration with Plan Documents Module and *ftw*Portal Pro for automated census collection (by plan or by batch)
  - Automated population of Schedule SB form and attachments
  - Embedded trust rate of return calculation
- **Easy-to-use cash balance and profit-sharing calculations** using group-defined formulas, including minimums for IRC 401(a)(26) and maximums for IRC 415 purposes

- **DB valuations:** Perform beginning or end of year actuarial valuations and produce/calculate:
  - Client-ready valuation report pages
  - AFTAP certification
  - Quarterly contributions
  - IRC 430 Effective Rate
  - Amortization base maintenance including ARPA provisions
  - Contributions and other transactions tracking
  - Interest-adjusted contributions
  - Final minimum contribution due at any date
  - Schedule SB line item information and attachments
- **PBGC line item information produced**

- **Compliance testing:** Non-discrimination, coverage, and minimum participation with detailed results reports for stand-alone DB or DB/DC combination plans
- **Auto-solve for combo plan nondiscrimination testing**
- **Reports:** Editable pre-packaged reports for Compliance Testing and DB Valuations. Ability to create customized client packages
- **Proposals for cash balance or combo plans:** design plans, run first year valuation results and compliance tests for multiple cash balance and/or combo plan designs with a click of a button, and produce a customizable report to present to clients

September 2022