ftwilliam.com Software:
*ftw*Portal Pro

The ftwilliam.com portfolio is fully 100% cloud-based software that streamlines time-consuming tasks for the employee benefits professional. The applications are easy to use and integrated to ensure that data flows effortlessly between the different modules.

The **_ftw_Portal Pro** module offers secure two-way access by plan sponsors and other related parties to plan documents, government forms, census, and other secure data.

Software Highlights

- **Global Dashboard**—modern user interface with global and plan level dashboards allows users to quickly view all portal users, plans and communications. Load documents, forms, newsletters and more to the portal individually or in batch mode.

- **Send Messages**—Send secure messages to the web portal for your clients to read. Plus, directlink option now available - easy access for recipients to view non-sensitive information without having to log-in.

- **Post Annual Notices and Required Amendments**—Prepare your notices and amendments and post them to the web portal. If you purchase access to our documents software, you may do this in batch mode.

- **E-sign Documents**—Clients can e-sign amendments, plan documents, and other miscellaneous documents via the web portal just like 5500s.

- **Streamlined Census and Annual Questionnaire Collection and Delivery**— Choose from batch delivery or online electronic completion on the portal, and seamlessly import the information directly into our Admin software.

- **Reminders**—Send notifications reminding your clients to download a message or a document, e-sign, and more.

- **Automatic Delivery of Documents and Supporting Forms**—If you're using our documents software, you may automatically deliver documents and supporting forms directly to the portal.

- **Batch Documents**—Send a file for multiple plans at one time or customized documents for all plans at one time.

- **Download History**—Track portal activity in one place and apply filters for easier searching.

- **Branding**—Portal branding available.

- **To-Do List**—All of your clients' tasks listed in one easy-to-read to-do list when logged into the web portal.

- **Client and document** classifications available and customizable.

- **Unlimited portal users and customizable access**— Customers may have unlimited portal users and customize what type of access each will have.

- **Folders**—Create folders to place your documents in via the web portal. This provides better organization and makes it easier to find documents once they are loaded to the portal.

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Visit ftwilliam.com or call 1-800-596-0714 to learn more.