



ftwilliam.com Managed Services

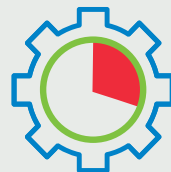
Combine the efficiencies you want, with the results you need!

Retirement plan administrators face unprecedented challenges in today's evolving and complex landscape. Increasing talent shortages, compliance complexities, and decreasing margins hinder growth and profitability.



2.75 years

2.75 years on average for a retirement plan service provider to become profitable on a plan.



36%

of retirement plan service providers plan to shift to a more cost-effective operating model in the next 12 months.

Your collaborative solution: ftwilliam.com Managed Services:

We're not just an outsourcing provider – we're your strategic partner. Our Managed Services offering is focused on delivering our vast expertise to assist you in overcoming the multitude of challenges you face.

Our credentialed employees have experience working as administrators for retirement service providers and are experts on the FTW software. We are more than data entry. We help fill gaps so your employees can focus on growing your business and increasing client satisfaction.

Managed Services offerings:

Partnering with ftwilliam.com helps firms streamline the tedious tasks that can drain the time and energy of your valuable staff members. With our managed services offering, we can help with the following:

- **Document Management:** Assist in handling amendments, restatements, and new plan creation.
- **Forms Completion:** Completion of 5500 & 5558 forms and 8955-SSA filings.
- **Compliance Testing:** Navigate annual compliance testing and ensure adherence to complex regulations.
 - Census Upload: Seamless data management and upload for accurate compliance and reporting.
- **Additional Ancillary Services:** Numerous services are available on an a-la-carte basis, including:
 - Trust accounting for pooled and/or brokerage accounts
 - Deposit reconciliation
 - Controlled service group/Affiliated service group determination
 - Long Form 5500/Audit assistance (including Schedule H preparation)
 - New comparability illustrations
 - Self-employment calculation
 - Loan tracking
 - Documentation and data gathering for DOL audit(s) and/or correction effort(s)
 - 5330/lost opportunity calcs
 - Timely deposit review
 - Manual entry to census and vendor upload files

According to PwC, companies that use Managed Services providers for a strategic advantage are **1.6x** and **2.4x** more likely to be **faster to market** and **more innovative**, respectively, than those focused solely on cost savings from traditional outsourcing.

Benefits You'll Gain:

- **Expertise Beyond Outsourcing:** Our credentialed team members are not just data entry clerks. With years of industry experience, they are seasoned retirement plan experts who understand your needs.
- **Risk Mitigation:** Ensure compliance, minimize risk exposure, and navigate complex regulations confidently.
- **Amplified Efficiency:** Benefit from cloud-based technology and innovative processes that streamline operations, reduce costs, and improve overall efficiency.
- **Unleashed Scalability:** Whether you're a large or small retirement plan service provider, our Managed Services can flex to accommodate your business's changing needs, enabling you to take on more plans without compromising quality.

Choose Success with ftwilliam.com:

Our Managed Services aren't just about outsourcing tasks – they're about gaining a strategic partner that empowers your business for success. Elevate your operations, enhance client satisfaction, and embrace a future of streamlined excellence. Unlock the full potential of your business with ftwilliam.com's Managed Services.