



ftwilliam.com Software: Non-Qualified Plan Documents

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 **Non-Qualified Plan Document** package from ftwilliam.com provides both a 457(b) and 409A plan document. Both documents are generated in an Adoption Agreement and Basic Plan Document.

The 457(b) document may be used by either a governmental or a tax-exempt entity. A tax-exempt entity can use the document to establish a top-hat plan. A governmental entity can use the document to establish a plan for their rank and file employees.

The 409A document is a defined contribution plan that may be used to establish both an excess benefit and a top-hat plan for a select group of management or highly compensated employees.

The **Non-Qualified Plan Documents** package from ftwilliam.com combines powerful technology, in-house attorney-written documents, and world class customer support to provide you with a first class document generation solution.

Our **Non-Qualified Plan Documents** are available both via subscription and per-plan pricing options. Discuss with your ftwilliam.com sales consultant which might be the best option for you.

Supporting Documents

1. Plan Description
2. Other Documents/Forms (All Custom Generated based on Checklist Answers)
 - DOL Top Hat Filing
 - Wage Deferral Agreement
 - Special Deferral Agreement
 - Beneficiary Designation
 - Rollover Contribution
 - Special Tax Notice
 - Distribution Election Form
 - Inservice Distribution Form
 - Loan Procedures
 - Loan Application
 - Promissory Note
 - QDRO Procedures