ftwilliam.com Software: 5500/PBGC Forms

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 **5500/PBGC Forms** module facilitates fast, easy, and error-free e-filing, and allows for e-signing and e-filing of 5500 forms for EFAST2.

Schedules Included:

Form 5500
Form 5500-EZ
Form 5500-SF
Schedule A
Schedule C
Schedule D
Schedule G
Schedule H
Schedule I
Schedule MB
Schedule R
Schedule SB
Annual Funding Notice
Summary Annual Report
Client transmittal letter
Attachments to 5500 schedules

PBGC Forms

Comprehensive Filing
Form 10
Form 10 A
Form 200

Other Forms

Form 8955-SSA
Form 5330
Form 2848
Form 8821
Form 8822-B
Form 56
Form 8868
Form 720
Form 990
Form 990 Sch O
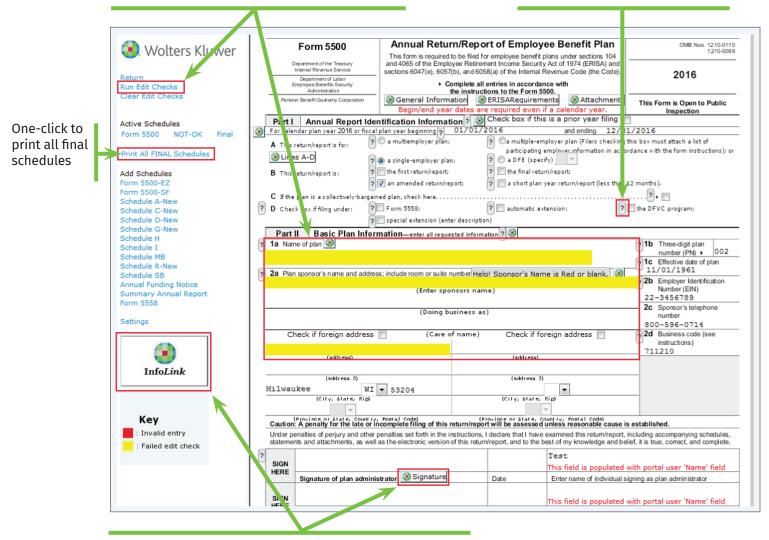Form 990T

Software Highlights

- Our innovative Web portal allows your clients to sign 5500 Forms with the click of a button. The portal may be branded with your logo and integrated with your website. No additional cost to use our portal.

- Batch 55Autofill—Last year's filing is automatically pulled from the DOL database based on client's EIN. Also available in batch for quick and easy conversion.

- Our partnership with PensionPro allows your 5500 data to flow seamlessly into PensionPro's Workflow software, providing you with greater control, efficiencies, and compliance.

- InfoLink—Direct access to the 5500 Preparer's Manual via InfoLink. Available for an additional fee.

- Context-sensitive help buttons and extensive edit checking features help you maintain accurate forms.

- Schedule and form uploads available in .csv and XML format.

- Batch print all of your Summary Annual Reports, Annual Funding Notices, Form 5558s, and 8955-SSAs.

- 8955-SSA Fulfillment Service — We take care of e-filing for you via our web portal (additional fees apply).

- 5500 Workflow Grid— Assign plans to administrators, track status of e-signatures, and track whether plans have been submitted and accepted by the DOL.

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Quickly run edit checks at any time. The software will highlight in yellow all questions on the form/schedule that do not pass an edit check

Context-sensitive help buttons next to each line item in the form of a grey box with question mark inside

One-click to print all final schedules

Wherever you see a Wolters Kluwer logo wheel, you can click on it for direct access to the relevant content within the *5500 Preparer's Manual*. (Additional subscription fee applies.)