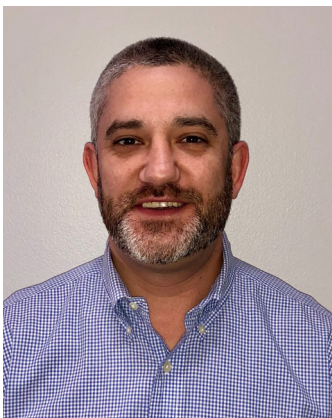


Customer Spotlight

Converting to ftwilliam.com is simple—and integration between modules is powerful.

This customer spotlight is based on an interview with **Todd A. Henry**, QPA QKA, President, PA Retirement Solutions, and **James Delaney**, QKA, Senior Plan Administrator.



Todd has been working in the retirement plan industry since 1998 and is an industry expert in complex plan design for all defined contribution plans. As Senior Plan Administrator, James is a highly qualified expert on the systems and processes necessary to provide excellent service to clients in this industry. The firm, PA Retirement Solutions, had been using a different software vendor, FIS Relius, but soon after switching, ftwilliam.com's software quickly became the organization's favorite. The staff at PA Retirement Solutions has found that ftwilliam.com's software is just not as cumbersome.

"Every single employee here has used the FIS Relius software we were using before, either with us or elsewhere at some point, and most now prefer ftwilliam.com. ftwilliam.com is more streamlined and gives more flexibility. With the other software, we were paying for features and functionalities that were not important to our clients."

"Our prior software provider claimed they had integration between their software, but we never saw it – we got it with ftwilliam.com."

"Flexibility" includes real integration between modules

Because the ftwilliam.com software is 100% cloud-based, all of the modules are fully integrated. The data PA Retirement Solutions enters in one module is automatically shared with any other modules. Todd and James have found that this saves time, adds flexibility, and increases efficiency. To begin with, the fact that data flows between modules immediately eliminates manual and duplicative data entry. But there are more advantages as well, including better service to clients.

"Our prior software provider claimed they had integration between their software, but we never saw it, whereas with the ftwilliam proposal software, we can easily convert data out of the administrative software into proposals to run illustrations and deliver proposals that look great for clients. Integration with all the data in the 5500 forms software is also very beneficial. Integration is something we always wanted, and we got it with ftwilliam."

System conversion is simple

PA Retirement Solutions was young and small when they onboarded ftwilliam.com. They didn't have too many plans to convert, about 150, but they still expected conversion to be harder. In reality, it was simple. In fact, the process of converting files over to the ftwilliam.com software was so simple, their "conversion" process focused primarily on learning how to use the system and getting things started correctly, which PA Retirement Solutions also found was not much of a challenge.

"The conversion to ftwilliam.com documents was a non-event. It was a very simple process. Like with anything, there was a little bit of a learning curve, but ftwilliam's system is not cumbersome, and everyone picked it up quickly without having to ask ftwilliam too many questions."

The software has supported organizational growth—and saved time

PA Retirement started their business in 2010 with three employees total, including the two owners. The firm onboarded ftwilliam.com in 2012, and today the company has grown to 13 employees with ten users on the ftwilliam.com software. The company now manages 600 plans.

Interestingly, though the company has taken on more employees, everyone works more efficiently than at the start, based on the time-saving features that ftwilliam.com delivers.

"There is definitely time savings on the administration side. We are spending less time working in administration than we did with our previous software."

Customer service adds another dimension of ease and excellence

Today, PA Retirement Solutions rarely turns to ftwilliam.com for support as their team is fully trained and comfortable with the software, but when needed the response time from ftwilliam.com is rapid. Even when they were looking for software support at the outset, the responses came immediately.

"Today we don't reach out for support very often. We definitely used support when necessary during our first two years using the compliance software. Customer support is so quick at ftwilliam.com—their response time is amazing."

"We're very happy we switched to ftwilliam.com."

To learn more, please visit ftwilliam.com or call 1-800-596-0714 to schedule a demo.