



ftwilliam.com Defined Benefit Proposal

Confidently propose the best plan options for your client

ftwilliam.com's Defined Benefit Proposal Module is an innovative, cloud-based proposal solution designed for Retirement & Benefit professionals to help you present your clients with the best possible plan options and save time.

Enhanced plan data

- Our software helps you illustrate the best plan options from the data that is entered or populated from the ftwilliam.com Defined Benefit Compliance Module

Intuitive and easy to use

- Integrated with ftwilliam.com's Defined Benefit Compliance module for easy data management and startup plan valuation costs
- Compares various combinations of cash balance and defined contribution allocations to maximize benefits to certain participants
- Cash balance and profit sharing formulas can be defined by group, alongside additional entered defined contributions
- Allows the addition of client's tax bracket to show realistic cost/benefit of plan design
- Calculates cash balance plan liabilities and required contributions, and performs combo plan compliance tests with a click of a single button

Instant proposals

- Creates 1-5 separate proposal options simultaneously with pie charts in a single report
- Customizes your proposal print options (logo, font type, cover page, and more)

Visit ftwilliam.com, or call 1-800-596-0714, for a free trial or to schedule a demo.

Easily customize the format of your proposal to include your logo, change the font type, or modify the .rtf report output before printing.

You can define up to ten cash balance and profit sharing allocation groups and create up to five plan designs to compare side-by-side. After reviewing testing results online and updating options to your satisfaction, you simply run the report.

Edit Proposal Print Settings ✕

Font Type: Times New Roman ▾

Cover Page: Yes ▾

Cover Logo

Logo On Cover: Yes ▾

Cover Logo: Upload Cover Logo Delete Cover Logo

Logo scale in percent: 100 ▾

Logo position: Left ▾

Page Logo

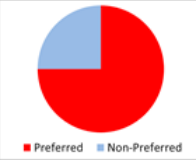




Logo On Pages: Yes ▾

Page Logo: Upload Page Logo Delete Page Logo

Logo scale in percent: 50 ▾

Logo position: Left ▾

Close
Update

Sample Combo Plan Designs Allocation Summary 2020						
Descriptions of Options:						
Option 1:	4% CB Combo					
Option 2:	DC only plan					
Option 3:	Combo plan with Groups 1					
Option 4:	Combo plan with Groups 2					
Option 5:	Combo plan with Groups 3					
Allocation Summary:						
Participant Name	Pay	Option 1	Option 2	Option 3	Option 4	Option 5
Preferred - Total Allocations:						
EE1, EE1	\$200,000.00	\$16,560.00	\$7,500.00	\$108,560.00	\$28,560.00	\$245,564.00
EE2, EE2	\$98,000.00	\$5,670.00	\$1,750.00	\$101,750.00	\$11,550.00	\$217,681.00
EE5, EE5	\$250,000.00	\$18,090.00	\$6,500.00	\$87,882.00	\$33,090.00	\$87,882.00
1. Total:	\$548,000.00	\$40,320.00	\$15,750.00	\$298,192.00	\$73,200.00	\$551,127.00
2. Total Non-Preferred:						
3. Employer Non-Preferred:	\$330,000.00	\$13,200.00	\$0.00	\$7,000.00	\$5,050.00	\$7,000.00
% to Preferred Total (Line 1/Line 1 + Line 2)		75.34%	100.00%	97.71%	93.55%	98.75%
% to Preferred Employer (Line 1/Line 1 + Line 3)		75.34%	100.00%	97.71%	93.55%	98.75%
Preferred Share of Allocations:						
Option 1 - 75.34%	Option 2 - 100.00%	Option 3 - 97.71%	Option 4 - 93.55%	Option 5 - 98.75%		
						

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