



ftwilliam.com Software: Welfare Plan Documents

The **ftwilliam.com** portfolio is fully web-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.

Recently enhanced, the **Welfare Plan Documents** module helps you effectively administer your plan documents.

Welfare Plan Documents

- Cafeteria Plan — Basic Plan Document, Adoption Agreement or IDP (Individually Designed Plan)
- Premium Only Plan (POP) — Basic Plan Document and Adoption Agreement
- WRAP Plan Document
- HRA Plan Document
- Transit Plan
- Qualified Small Employer HRA (QSEHRA)
- ACA policy

Software Highlights

- Compliance with all DOL, ERISA, and ACA regulations.
- No additional cost for updates and amendments.
- No additional costs for generation of supporting materials, summary plan descriptions, corporate resolutions, and participant forms.
- Extensive error checking and context-sensitive help buttons.
- Batch amendment capabilities (with annual subscription).
- *ftwPro* Amend for Welfare Plans — Track changes to your document and automatically create a customized consent, SMM and amendment.

New! Extensive Enhancements and Features

Basic Plan Document

- Each benefit is in its own Article with each benefit addressing eligibility, enrollment, limitation, administration, and termination of employment.

Cafeteria Plan

- New IDP version of Cafeteria Plan.
- Health FSAs and Limited FSAs, as well as Dependent Care Assistance Accounts and Adoption Assistance FSAs, are separated to provide greater flexibility and customization of benefits, matching contributions, and non-elective contributions within the plan.
- Options for Flex Credits and Purchase/Sale of PTO.

WRAP

- Interface allows you to link **ftwilliam.com** welfare plans to WRAP document and allows for the ability to edit check all linked documents simultaneously.
- Option within the WRAP SPD to link plans appended to the WRAP SPD.

Employer Contributions

1. **Matching Contributions.** The Plan permits Employer matching contributions to the applicable Benefits as follows:

a. **Health FSA**

- None
- Discretionary
- _____ % of the Participant's Health FSA contribution up to _____ % of the Participant's Compensation
- _____ % of the Participant's Health FSA contribution up to \$ _____
- Other: _____

b. **Limited Purpose / Post-Deductible Health Flexible Spending Account (HSA-Compatible)**

- None
- Discretionary
- _____ % of the Participant's HSA-Compatible Health FSA contribution up to _____ % of the Participant's Compensation
- _____ % of the Participant's HSA-Compatible Health FSA contribution up to \$ _____
- Other: _____

c. **Dependent Care Assistance Plan Account**

- None
- Discretionary
- _____ % of the Participant's DCAP Account contribution up to _____ % of the Participant's Compensation
- _____ % of the Participant's DCAP Account contribution up to \$ _____
- Other: _____

d. **Adoption Assistance Flexible Spending Account**

- None
- Discretionary
- _____ % of the Participant's Adoption Assistance FSA contribution up to _____ % of the Participant's Compensation
- _____ % of the Participant's Adoption Assistance FSA contribution up to \$ _____
- Other: _____

Cafeteria Plan adoption agreement — extensive options now available for you to select and customize your plan document.

Visit ftwilliam.com or call 1-800-596-0714 to learn more.