



ftwilliam.com Defined Benefit Compliance and Proposal Software

Alleviate the business risks inherent in outdated, non-web-based software with ftwilliam.com's 100% cloud-based, modern **Defined Benefit Compliance (DB Compliance)** software - a complete proposal, valuation and testing system.

Eliminate the pain point of duplicative manual data entry! Our DB Compliance software is integrated with the following ftwilliam.com modules connecting everything for you: *Defined Contribution Compliance Testing & Reporting, Plan Documents, DB and DC Proposal, and Portal.*

Advantages of using ftwilliam.com's cloud-based Defined Benefit Compliance software:

- Secure software fully accessible from any location –employees can work from anywhere, and employers can recruit from anywhere
- NO hardware or cloud server installation, infrastructure investment, need for continuous IT support, data storage requirements or costs!
- Unlimited number of concurrent users
- Continuous and automatic software updates – nothing to download or install locally
- No VPN is required to dial in or multiple programs to open
- Easily upload/download data using CSV and Excel files to efficiently move information in and out as needed
- Securely and quickly share data between a TPA and back office actuary
- Eliminate the need to email pdfs or invest in secure file transfer methods
- Innovative functionality and integration across modules will increase your operational efficiencies and improve overall profitability

The first new Defined Benefit Compliance software launched in more than 20 years!

Easy access to other modules:
PORTAL- COMPLIANCE - PROPOSAL

DB Compliance Tasks: Task list to complete a beginning of year valuation and end of year compliance testing

Lock Valuation: Lock valuation calculations (protect from plan amendments)

Compliance Tests: Standalone DB or combo compliance testing with run buttons

Key features include:

- **Plan Designs Supported:** Cash balance and traditional DB designs with group formulas
- **Plan Specifications:** Automatically import plan specifications from the ftwilliam.com plan documents module, or manually enter plan specifications for valuations
- **DB Valuations:** Perform beginning or end of year actuarial valuations and create custom reports from a results output file or leverage editable, pre-packaged valuation report pages
- **Compliance Testing:** Non-discrimination, coverage, and minimum participation (IRC 401(a)(26)) testing for stand-alone DB or DB/DC combinations
- **Reports:** Editable pre-packaged reports for Compliance Testing and DB Valuations
- **DB or DB/DC Combo Proposals:** design plans, run first year valuations results and compliance tests for multiple cash balance and/or combo plan designs with a click of a button, and produce a customizable report to present to your clients
- **ftwPortal Pro Integration:** automated census collection via ftwPortal Pro (by plan or by batch)

All supported by our industry leading Customer Support team who is always available to help when you need it.

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