



New! ftwilliam.com's Distribution Tracking Software (DTS), was built by retirement service providers for retirement service providers, to automate all tasks associated with preparing and tracking distributions.

Save Time, Reduce Your Risk and Operating Costs, and Increase Your Efficiency

Our built-in accountability tools streamline communication, and data collection, making distribution preparation and tracking faster and more efficient. Real-time updates keep you and your client's informed, so you know exactly where each distribution is, and can avoid costly VCP filings.

Integration with other ftwilliam.com modules:

- **Compliance** Pull in existing participant data and push any new participants added in DTS to compliance
- 1099 Push data from DTS into 1099 software for easy Form 1099 preparation
- Documents Pull in plan document specifications for easy reference in DTS

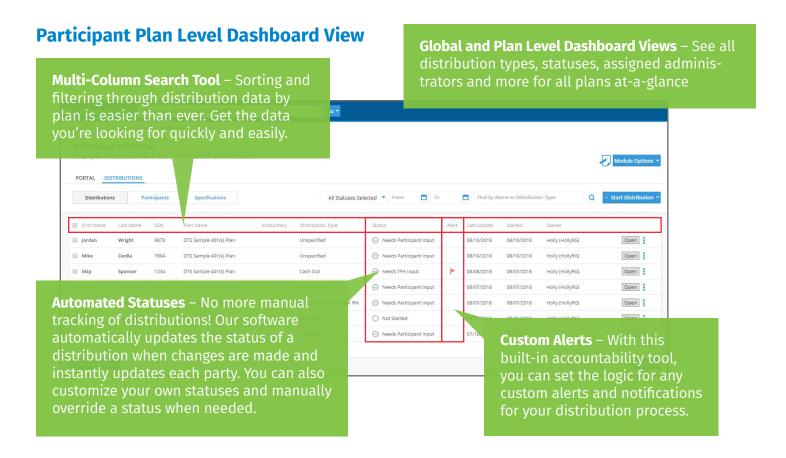
Portal Data Collection – Fully optimized for mobile devices, you can collect everything you need to process a distribution via the distribution portal.

Quick View – Everything you need to know about a distribution can be seen at-a-glance in the distribution summary, including custom activity, all files received via the portal, and notes.

Document Exchange – Send any document via the portal for download and receive signed/completed forms and documents from plan sponsors and participants.

Template Manager – Use our templates, create your own, and even download onto your company letterhead. Instantly create custom custodial directives, spousal consents, and more.

Batch Features – Batch Import Distributions for force outs, plan termination, and conversion. Plus, batch print and attach custom documents to your distribution records.



Participant Portal with Tracking View (fully optimized for mobile devices):

Both the Plan Sponsor and participant can view this portal to easily and swiftly identify where exactly their distribution is every step of the process, increasing transparency and reducing the amount of calls and emails requesting status updates.

