



# ftwProposal Pro

## Confidently propose the best plan options for your client

**ftwProposal Pro** is an innovative 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 ftw Compliance Module

### Intuitive and easy to use

- Integrated with ftwilliam.com's Compliance module and Plan Document software so that your data flows seamlessly from Compliance and/or Plan Document into ftwProposal Pro
- Compares various combinations of employer contributions to maximize benefits to certain participants
- Allows the addition of client's tax bracket to show realistic cost/benefit of plan
- Calculates complex allocations and performs compliance tests with a click of a single button
- Autosolve feature for general test

### Instant proposals

- Creates 2-5 separate proposals simultaneously with pie charts
- Customizes your proposals (logo, font type, cover page, and more)

**Visit [ftwilliam.com](http://ftwilliam.com), or call 1-800-596-0714, for a free trial or to schedule a demo.**

**Proposal Specifications**

[Import Document](#)  
[Import Admin](#)

	Proposal 1	Proposal 2	Proposal 3	Proposal 4	Proposal 5
Enter description of proposal option:	Pro-rata	Integrated at TW	New Comp	Integrated at 80%	Integrated at 60%
<b>Contribution Sources</b>					
Elective Deferrals:	Yes	Yes	Yes	Yes	Yes
Safe harbor type:	No	No	No	No	No
Matching Contributions:	No	No	No	No	No
Profit Sharing Contributions:	Yes	Yes	Yes	Yes	Yes
<b>Safe Harbor Allocations</b>					
Number of Safe Harbor Matching rates:	2 rates	2 rates	1 rate	1 rate	1 rate
Enter rate of Matching Contributions on first tier (without % sign):	100.00	100.00	0.00	0.00	0.00
Enter maximum amount of Employee Contributions matched on first tier (without % sign):	3.00	3.00	0.00	0.00	0.00
If two tiers, enter rate of Matching Contributions on second tier (without % sign) if one tier, enter zero:	50.00	50.00	0.00	0.00	0.00
If two tiers enter maximum amount of Employee Contributions matched on second tier (without % sign):	2.00	2.00	0.00	0.00	0.00
Nonselective Safe Harbor contribution:	3.00	3.00	3.00	3.00	3.00
<b>Non Safe Harbor Matching Allocations</b>					
Matching Contribution formula (if SH Match, enter number of added Tiers):	2 rates	1 rate	1 rate	1 rate	1 rate
Enter rate of Matching Contributions on first tier:	0.00	0.00	0.00	100.00	100.00
Enter maximum amount of Employee Contributions matched on first tier:	0.00	0.00	0.00	4.00	4.00
If two tiers, enter rate of Matching Contributions on second tier:	0.00	0.00	0.00	0.00	0.00
If two tiers enter maximum amount of Employee Contributions matched on second tier:	0.00	0.00	0.00	0.00	0.00
<b>Profit Sharing Contribution</b>					
Profit Sharing allocation formula:	Pro rata	Integrated	New Comparability	Integrated	Integrated
Allocation type for types other than New Comparability:	Dollar	Dollar	Specified	Dollar	Dollar
<b>Profit Sharing - Integration</b>					
If "Integrated", integration level for determining Excess Compensation:	TWB	TWB	Fixed %	80% TWB	Fixed %

You can manually enter data or import data directly from ftwilliam.com's Plan Document and ftwilliam.com Compliance module to populate Option 1. From there, you can create additional options by adjusting the various specifications. Once satisfied, you simply run the report to determine which options are optimal by reviewing the test results and amounts to preferred person.

**Profit Sharing - New Comparability Groups**

	Proposal 1	Proposal 2	Proposal 3	Proposal 4	Proposal 5
Group 1:	Percent   0.00	Percent   0.00	Dollar   17250.00	Percent   0.00	Percent   100.00
Group 2:	Percent   0.00	Percent   0.00	Dollar   1000.00	Percent   0.00	Percent   7.00
Group 3:	Percent   0.00	Percent   0.00	Dollar   1750.00	Percent   0.00	Percent   2.00
Group 4:	Percent   0.00	Percent   0.00	Percent   0.00	Percent   0.00	Percent   0.00
Group 5:	Percent   0.00	Percent   0.00	Percent   0.00	Percent   0.00	Percent   0.00
Group 6:	Percent   0.00	Percent   0.00	Percent   0.00	Percent   0.00	Percent   0.00
Group 7:	Percent   0.00	Percent   0.00	Percent   0.00	Percent   0.00	Percent   0.00
Group 8:	Percent   0.00	Percent   0.00	Percent   0.00	Percent   0.00	Percent   0.00
Group 9:	Percent   0.00	Percent   0.00	Percent   0.00	Percent   0.00	Percent   0.00
Group 10:	Percent   0.00	Percent   0.00	Percent   0.00	Percent   0.00	Percent   0.00

ftwProposal Pro can set up 10 different allocation groups (each group can have a separate profit sharing contribution dollar or percentage). The tool then runs the calculations and compliance tests. If the allocations fail the compliance testing, it will automatically calculate and suggest the amount needed to pass the testing.

**Edit Proposal Print Options**

**Upload Cover Logo** [Upload cover logo](#) | [Delete cover logo](#)

Font Type:

Cover Page:

Logo On Cover:

Logo scale in percent:

Logo position:

**Upload Page Logo** [Upload page logo](#) | [Delete page logo](#)

Logo On Pages:

Logo scale in percent:

Logo position:

Easily customize the format of your proposal to include your logo, add a cover page, change the font type, and more, before printing.

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