



# 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
- Autosolve feature for general test

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