

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)

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.

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.

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