Today's Agenda
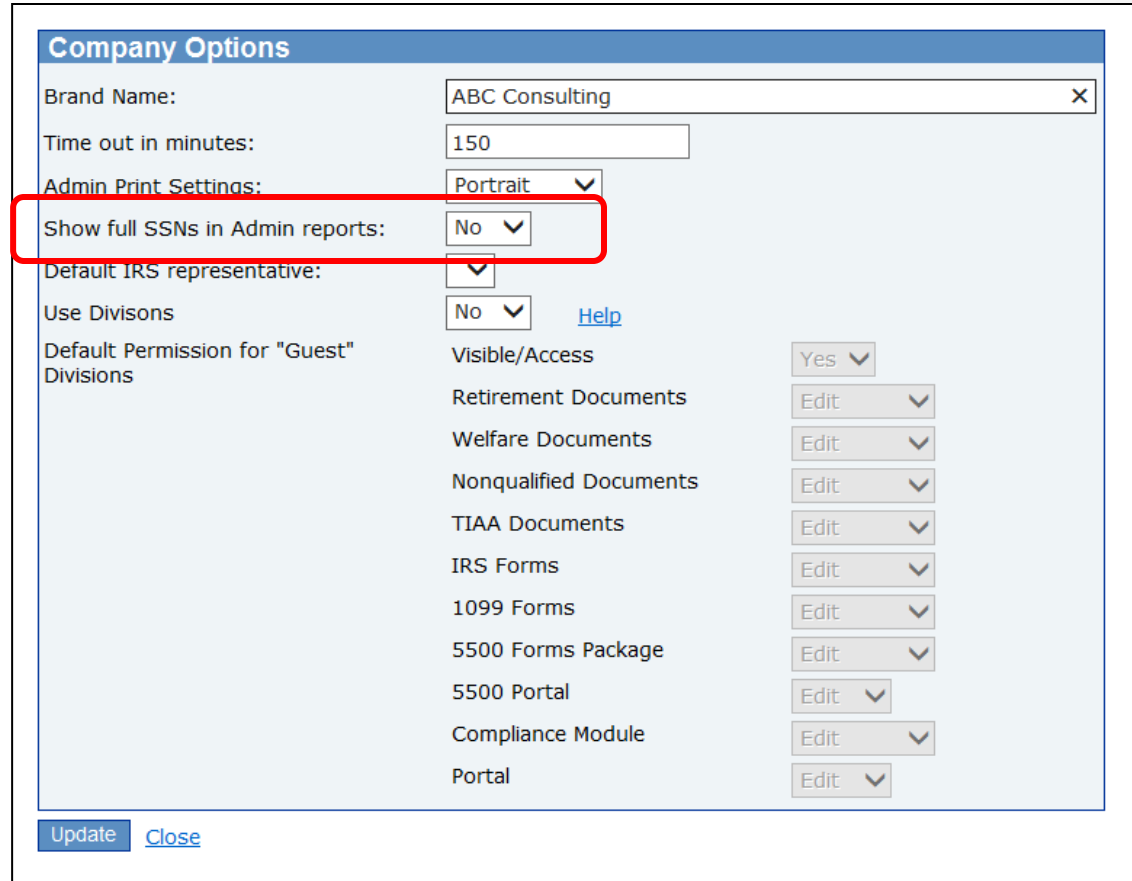
- New releases to the admin software

- Update on vendor import files

- Proposal software

- Ftwilliam.com User Conference

- Open discussion

Wolters Kluwer
Law & Business

New Releases to the Admin Software

- Various enhancements to test reports
  - Enhanced formatting for dollars and percentages
  - More explanation of results
- Option to mask SSNs or show in full on reports
  - Mask means just the last four digits show

Wolters Kluwer
Law & Business

3

New Releases to the Admin Software

- Option to mask SSNs or show in full on reports

- Set on Admin Menu/ Company Profile

Company Options

Brand Name:	ABC Consulting ✕
Time out in minutes:	150
Admin Print Settings:	Portrait ▼
Show full SSNs in Admin reports:	No ▼
Default IRS representative:	▼
Use Divisons	No ▼ Help
Default Permission for "Guest" Divisions	
	Visible/Access	Yes ▼
	Retirement Documents	Edit ▼
	Welfare Documents	Edit ▼
	Nonqualified Documents	Edit ▼
	TIAA Documents	Edit ▼
	IRS Forms	Edit ▼
	1099 Forms	Edit ▼
	5500 Forms Package	Edit ▼
	5500 Portal	Edit ▼
	Compliance Module	Edit ▼
	Portal	Edit ▼

Update   Close

Wolters Kluwer
Law & Business

Update on Vendor Import Files

- Recently added Mass Mutual

- Still working on adding American Premier platform

- Ascensus update

- Please let us know if you have problems uploading transaction files

Wolters Kluwer
Law & Business

Proposal Software

- Currently in beta testing – available to most users free of charge

- Due for release for sale August 1

- Basic version $495
  - 30 plans, up to three proposals

- Premium version $950
  - Unlimited plans, up to five proposals
  - Additional functionality if also have admin software

Wolters Kluwer
Law & Business

ftwilliam.com 2013 User Conference	
When?	August 4-6, 2013
Where?	Northern Illinois University Conference Center, Naperville IL
Who?	TPA Business Owners, Administrators, Managers & Professionals
Cost	$149 plus travel & accommodation

Wolters Kluwer
Law & Business

ftwilliam.com 2013 User Conference

- Held in Naperville, IL
  - Sunday August 4 thru Tuesday August 6
- Admin software topics on the agenda
  - Two hands on basic training sessions for new users – should plan to attend both
  - Best Practices: Testing with the Admin Software
  - Best Practices: Working with Census Grids
- All admin sessions held in computer lab with some computers available

Wolters Kluwer
Law & Business

Open Discussion

- Next meeting will be at the 2013 ftwilliam.com User conference

- Ideas for future agenda items?

- Questions, suggestions…..

Wolters Kluwer
Law & Business