

**FTWILLIAM.COM FORM 5500
SOFTWARE TUTORIAL**

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WE WILL COVER:

- 55AutoFill (Conversion Tool)
 - Adding a Company
 - After adding a Plan
 - Batch 55AutoFill
- Draft/Edit Forms/Schedules
- Edit Checks
- Attachments
- Local Sign
 - Single Plan
 - Batch
- Setting up signers to use the Portal




WE WILL COVER CONT.

- 5500 Signer's Portal Experience
 - Logging into the portal
 - Signing Process
 - First time signing via ftw
 - Second (or more) times signing via ftw
 - Checking filing status
 - Will also cover TPA's view
- 5500 Workflow Grid
- Batch Features
 - 5558
 - SAR/AFN
- Show History



INFOLINK (AKA 5500 PREPARER'S MANUAL)

- What is InfoLink?

InfoLink allows users to link directly to the on-line version of the Aspen Publishers 5500 Preparer's Manual from the ftwilliam.com data entry screens without having to log on to the CCH website or retrieve the book and look for the answer. By clicking on special icons () in our Form 5500 software, the appropriate content from the 5500 Preparer's Manual will automatically appear in your browser.

- What is the benefit of InfoLink?

Aside from the context-sensitive help buttons, the InfoLink tool allows users to quickly find answers to more complex 5500 questions.

NOTE:

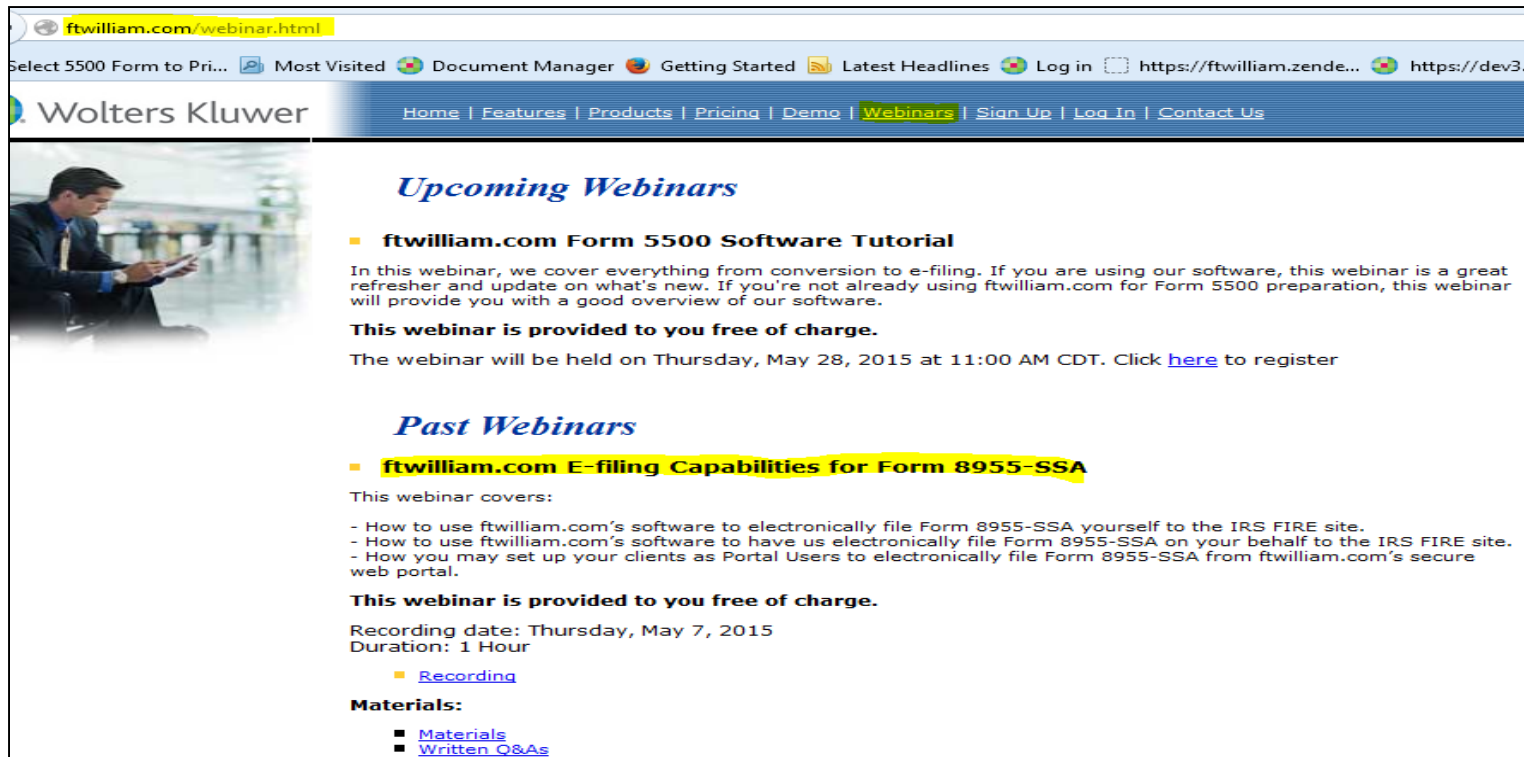
Written by Janice M. Wegesin, a well-known expert on Form 5500 preparation, the 5500 Preparer's Manual is the definitive single-volume reference that helps you handle the required annual Form 5500 filings for both pension benefits and welfare benefit plans. 5500 Preparer's Manual is a great resource for preparing your 5500 filing confidently and correctly.

Aspen Publishers 5500 Preparer's Manual in print – Click [here](#) to order and receive a special 15% discount for webinar attendees



FORM 8955-SSA

We will not cover the Form 8955-SSA during this webinar. To view a recent recording, click [here](#).
Or, you can go to our Webinars page to view the Past Webinar.



The screenshot shows a web browser window with the URL ftwilliam.com/webinar.html. The page header includes the Wolters Kluwer logo and navigation links: Home, Features, Products, Pricing, Demo, Webinars, Sign Up, Log In, and Contact Us. The main content is divided into two sections: "Upcoming Webinars" and "Past Webinars".

Upcoming Webinars

- ftwilliam.com Form 5500 Software Tutorial**
In this webinar, we cover everything from conversion to e-filing. If you are using our software, this webinar is a great refresher and update on what's new. If you're not already using ftwilliam.com for Form 5500 preparation, this webinar will provide you with a good overview of our software.
This webinar is provided to you free of charge.
The webinar will be held on Thursday, May 28, 2015 at 11:00 AM CDT. Click [here](#) to register

Past Webinars

- ftwilliam.com E-filing Capabilities for Form 8955-SSA**
This webinar covers:
 - How to use ftwilliam.com's software to electronically file Form 8955-SSA yourself to the IRS FIRE site.
 - How to use ftwilliam.com's software to have us electronically file Form 8955-SSA on your behalf to the IRS FIRE site.
 - How you may set up your clients as Portal Users to electronically file Form 8955-SSA from ftwilliam.com's secure web portal.**This webinar is provided to you free of charge.**
Recording date: Thursday, May 7, 2015
Duration: 1 Hour
 - [Recording](#)**Materials:**
 - [Materials](#)
 - [Written Q&As](#)



QUESTIONS?



APPENDIX

ftwilliam.com's Form 5500 Software features and benefits:

- Unlimited access to our 5500 program for the current year and all prior year returns
- EASY CONVERSION OF DATA. We will upload most filings from the DOL to our system for the last filing year
- Consistently, ftwilliam.com is one of the first vendors to release software updates
- SUPERIOR CUSTOMER SERVICE
- Complimentary one-hour training
- Our program is a completely web-based program; there is no software to install or updates to worry about
- Unlimited concurrency for your users
- Includes summary annual report and annual funding notice
- Includes the 8955-SSA
- Includes edit checking and context-sensitive help
- Includes the batch 5558, AFN & SAR features for printing
- Our program also includes upload and download capability for data
- Built in 'Work Flow' to manage entire filing process
- Reasonably priced; sold in blocks of 250 returns processed at \$675 per block-NO ADDITIONAL FEES

