



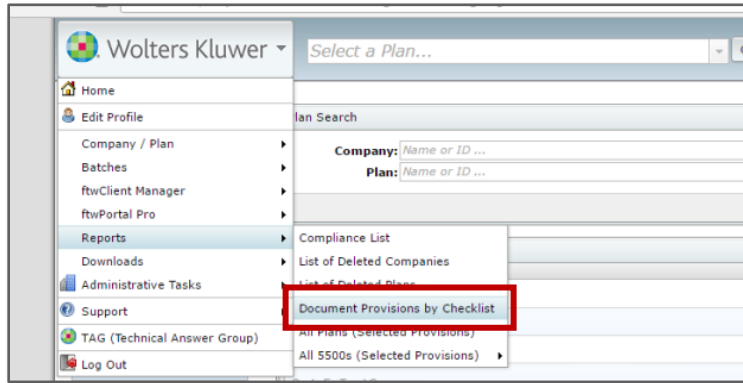
# PensionPro + ftwilliam.com

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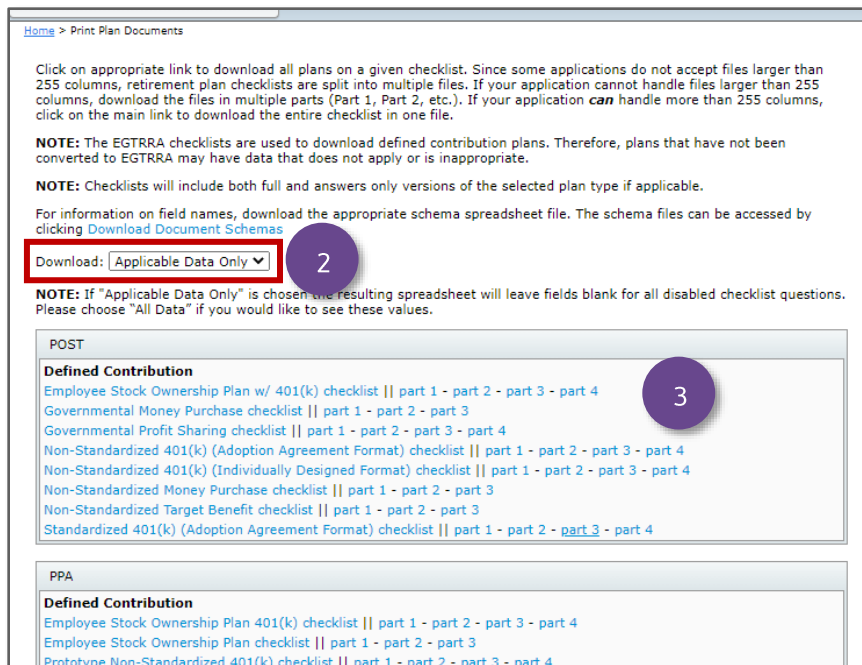
How-To Guide: Download Plan Specifications from ftwilliam.com

## Download Plan Specifications

After logging into the ftwilliam.com application:



1. From the Wolters Kluwer menu, select **Reports > Document Provisions by Checklist**. The *Print Plan Document* screen displays.



2. In the **Download** drop-down menu, select **Applicable Data Only**.
3. Click the hyperlink for the desired checklist type.

This downloads a .csv file with all the plans of this type on the system with all the stored company and plan checklist data. To import ftwilliam.com exported plan document specifications into PensionPro, the document must be saved as an Excel file.