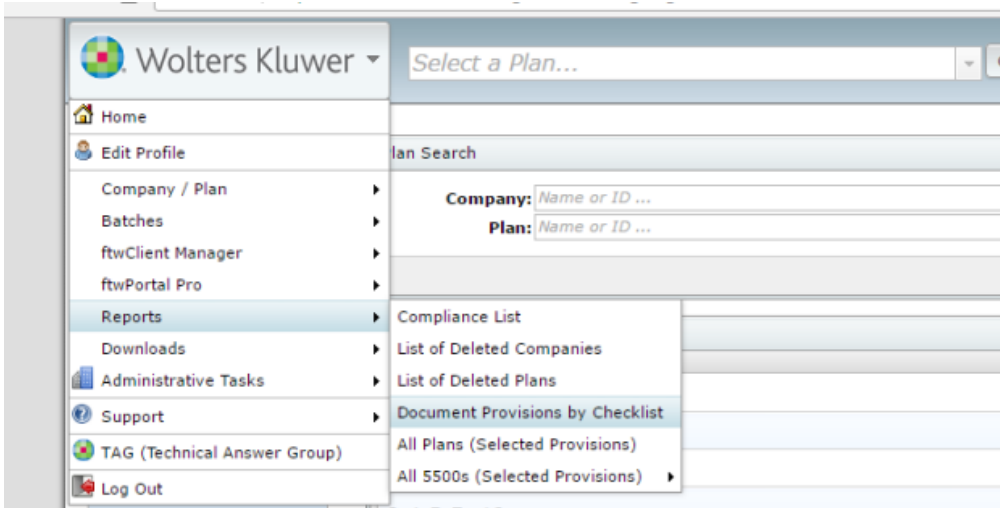


Instructions for Downloading Plan Specifications from ftwilliam.com

From the Wolters Kluwer Menu button go to Reports->Document Provisions by Checklist



From the page that opens confirm the dropdown selection is set to 'Applicable Data' and then click on the linked name of the checklist type that you want the data for. This will download a .csv file with all the plans of this type on the system with all the stored company and plan checklist data.

[Home](#) > Print Plan Documents

Click on appropriate link to download all plans on a given checklist. Since some applications do not accept files larger than 255 columns, retirement plan checklists are split into multiple files. If your application cannot handle files larger than 255 columns, download the files in multiple parts (Part 1, Part 2, etc.). If your application **can** handle more than 255 columns, click on the main link to download the entire checklist in one file.

NOTE: The EGTRRA checklists are used to download defined contribution plans. Therefore, plans that have not been converted to EGTRRA may have data that does not apply or is inappropriate.

NOTE: Checklists will include both full and answers only versions of the selected plan type if applicable.

For information on field names, download the appropriate schema spreadsheet file. The schema files can be accessed by clicking [Download Document Schemas](#)

Download:

NOTE: If "Applicable Data Only" is chosen the resulting spreadsheet will leave fields blank for all disabled checklist questions. Please choose "All Data" if you would like to see these values.

POST

Defined Contribution

[Employee Stock Ownership Plan w/ 401\(k\) checklist || part 1 - part 2 - part 3 - part 4](#)
[Governmental Money Purchase checklist || part 1 - part 2 - part 3](#)
[Governmental Profit Sharing checklist || part 1 - part 2 - part 3 - part 4](#)
[Non-Standardized 401\(k\) \(Adoption Agreement Format\) checklist || part 1 - part 2 - part 3 - part 4](#)
[Non-Standardized 401\(k\) \(Individually Designed Format\) checklist || part 1 - part 2 - part 3 - part 4](#)
[Non-Standardized Money Purchase checklist || part 1 - part 2 - part 3](#)
[Non-Standardized Target Benefit checklist || part 1 - part 2 - part 3](#)
[Standardized 401\(k\) \(Adoption Agreement Format\) checklist || part 1 - part 2 - part 3 - part 4](#)

PPA

Defined Contribution

[Employee Stock Ownership Plan 401\(k\) checklist || part 1 - part 2 - part 3 - part 4](#)
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