DB Ben Calc Instructions

11/20/2026 2:18 pm CST

Step 1 - Check the **Specifications** tab for warnings and update plan provisions as necessary.

Step 2 - Add participant data using the **Add/Update Data** icons on the right-hand side of the page.

Step 3 - Enter Proposed Distribution Date(s) into the data grid (this is a required input).

Step 4 - Review and enter and any additional relevant data found in the grid. Several fields are optional entries such as Certain Only months (only if that option is used), Beneficiary information (only if known), and cash balance vs. traditional DB plan information. Most of the fields can simply be entered to correct or complete the input data; however, there are a few calculated fields that require you to set the override indicator to Yes in order to bypass the calculation.

Step 5 - **Run All Benefit Calculations** on the page at one time by clicking the blue button for that, or run individual calculations by clicking the button under Run Status for that person.

Step 6 - Open the Election Form(s) to review entirely before sending to participants. ***Please make sure that each optional form of benefit complies with the IRC 415 limit. The system calculation does not do this.***

Step 7 - Regenerate forms with new information if requested by participants (such as for marital status and beneficiary's birth date), as these can impact the available options and benefit amounts.

Step 8 - Click checkbox(es) to select participants to Move to Previous Calculations tab or Delete when you are done. Use the **Do With Selected** button.

Contact ftwilliam Support by clicking your name in the top-right corner of the screen if you have questions or need assistance.