

**ELCO Mutual Insurance Group**  
**Funding Acceptance Chart for Legend Financial Marketing Services**

Fund Type	YES or NO	Notes
Non-Qualified Money	<b>Yes</b>	
Non-Qualified Stretch	Yes	
401(a)	<b>Yes</b>	New policy issued as traditional IRA
401(k)	<b>Yes</b>	New policy issued as traditional IRA
403(b)/TSA Plan/ Roth 403(b)	Yes	New policy issued as traditional IRA
457(b)	<b>Yes</b>	New policy issued as traditional IRA
501(c) Non-Profit	<b>No</b>	
529 Plan	<b>No</b>	
Defined Benefit Plan	<b>No</b>	
Keogh (HR-10) Plan	<b>No</b>	
Money Purchase Plan	<b>No</b>	
Profit-Sharing Plan	<b>No</b>	
SEPP 72(t)/ SEPP 72(q)	<b>No</b>	
<b>Traditional IRAs</b>		
Rollover IRA (Traditional)	<b>Yes</b>	
Custodial IRA	<b>No</b>	
Inherited IRA	Yes	
Nondeductible IRA/Taxable IRA	<b>No</b>	
Self-Directed IRA	<b>No</b>	
SEP IRA	<b>No</b>	
SIMPLE IRA	<b>No</b>	

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### Funding Acceptance Chart for Legend Financial Marketing Services

Fund Type	YES or NO	Notes
<b>Roth IRAs</b>		
Roth IRA	<b>Yes</b>	
Roth IRA Conversion (Full)	<b>Yes</b>	
Roth IRA Conversion (Partial)	<b>Yes</b>	
Backdoor Roth IRA	<b>No</b>	
Designated Roth/Roth 401(k)	<b>No</b>	
Inherited Roth IRA	<b>Yes</b>	
Self-Directed Roth IRA	<b>No</b>	
Spousal Roth IRA <small>(Living spouse assumes deceased spouse's Roth IRA.)</small>	<b>Yes</b>	
<b>Ownership</b>		
Charitable Lead Annuity Trust	<b>No</b>	
Charitable Remainder Annuity Trust	<b>No</b>	
Charitable Remainder Trust	No	
Charitable Remainder Unitrust	<b>No</b>	
Corporation	No	
Irrevocable Trust	Yes	
Family Limited Partnerships	<b>No</b>	
Revocable Trust	Yes	
Special Needs Trust	Yes	
Net Income with Make-up Charitable Remainder Unitrust	No	