

## Global Atlantic

### Funding Acceptance Chart for Legend Financial Marketing Services

Fund Type	Global Atlantic YES or NO	Notes
Non-Qualified Money	<b>Yes</b>	
Non-Qualified Stretch	Yes	Up to age 75 on our Foreaccumulation II and Securefore products
401(a)	<b>No</b>	
401(k)	<b>No</b>	
403(b)/TSA Plan/ Roth 403(b)	No	
457(b)	<b>No</b>	
501(c) Non-Profit	<b>Yes</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>Yes</b>	
<b>Traditional IRAs</b>		
Rollover IRA (Traditional)	<b>Yes</b>	
Custodial IRA	<b>No</b>	
Inherited IRA	Yes	Death Pre 2020 up to age 75. Death Post 2020 Bene must be spouse of deceased or no less than 10 years younger than the deceased.
Nondeductible IRA/Taxable IRA	<b>No</b>	
Self-Directed IRA	<b>NO</b>	
SEP IRA	<b>Yes</b>	
SIMPLE IRA	<b>No</b>	

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### Funding Acceptance Chart for Legend Financial Marketing Services

Fund Type	Insurance Company 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>No</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>No</b>	
<b>Ownership</b>		
Charitable Lead Annuity Trust	<b>Yes</b>	
Charitable Remainder Annuity Trust	<b>Yes</b>	
Charitable Remainder Trust	Yes	
Charitable Remainder Unitrust	<b>Yes</b>	
Corporation	Yes	
Irrevocable Trust	Yes	
Family Limited Partnerships	<b>Yes</b>	
Revocable Trust	Yes	
Special Needs Trust	Yes	
Net Income with Make-up Charitable Remainder Unitrust	Yes	