

Ibexis Life and Annuity Insurance Company
Funding Acceptance Chart for Legend Financial Marketing Services

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

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