|  |  |  |
| --- | --- | --- |
| **Fund Type** | **YES or NO (All cases subject to review for acceptance)** | **Notes** |
| Non-Qualified Money | **Yes** |  |
| Non-Qualified  Stretch | **Yes** | Indextra, JourneyMark, SPDA II, and SPIA products only. Pays with Exclusion ratio if withdrawals are kept to required distributions |
| 401(a) | **Yes** | Subject to available plan types listed on the app. Must have own TPA |
| 401(k) | **Yes** | Must have own TPA |
| 403(b)/TSA Plan/  Roth 403(b) | **No** |  |
| 457(b) | **No** | If the plan has to be “unfunded” (Non-governmental plan) and assets may be owned by the corp, we can have the corp own the annuity. |
| 501(c) Non-Profit | **Yes** |  |
| 529 Plan | **No** |  |
| Defined Benefit Plan | **Yes** |  |
| Keogh (HR-10)  Plan | **Maybe** | Contact Integrity life case by case |
| Money Purchase Plan | **Yes** |  |
| Profit-Sharing Plan | **Yes** |  |
| SEPP 72(t)/ SEPP 72(q) | **Yes** | Contact us for specific SEPP quote and form |
| **Traditional IRAs** | | |
| Rollover IRA  (Traditional) | **Yes** |  |
| Custodial IRA | **Maybe** | Contact Integrity life case by case |
| Inherited IRA | **Yes** | Pre-Secure Act cases and Post Secure Act Eligible Benes can stretch in a deferred Integrity Product. Post Secure Act Non-Eligible Benes are limited to 10 yr Inherited> SPIA for Integrity. (See 10 rules piece) |
| Nondeductible  IRA/Taxable IRA | **No** |  |
| Self-Directed IRA | **No** |  |
| SEP IRA | **Yes** |  |
| SIMPLE IRA | **No** |  |

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| **Fund Type** | **YES or NO** | **Notes** |
| **Roth IRAs** | | |
| Roth IRA | **Yes** |  |
| Roth IRA  Conversion (Full) | **Yes** |  |
| Roth IRA  Conversion (Partial) | **Yes** | Has to be from an external partial transfer/ conversion or an internal product that is out of surrender and transferred/converted to a new product. |
| Backdoor Roth IRA | **Maybe** | Each case has specific requirements and several steps. Might be able to facilitate. |
| Designated  Roth/Roth 401(k) | **No** |  |
| Inherited Roth IRA | **Yes** |  |
| Self-Directed  Roth IRA | **No** |  |
| Spousal Roth IRA  (Living spouse assumes deceased spouse’s Roth IRA.) | **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 | **Maybe** |  |
| Revocable Trust | **Yes** |  |
| Special Needs Trust | **Yes** |  |
| Net Income with Make-up Charitable  Remainder Unitrust | **Maybe** |  |