

Integrity Life Insurance Company

Funding Acceptance Chart for Legend Financial Marketing Services

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	

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SIMPLE IRA	No	
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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 <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	Maybe	
Revocable Trust	Yes	
Special Needs Trust	Yes	

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Net Income with Make-up Charitable Remainder Unitrust	Maybe	
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