

Oceanview Life and Annuity

Funding Acceptance Chart for Legend Financial Marketing Services

Fund Type	YES or NO	Notes
Non-Qualified Money	Yes	
Non-Qualified Stretch	Yes	
401(a)	Yes	We do not administer
401(k)	Yes	We do not administer
403(b)/TSA Plan/ Roth 403(b)	Yes	We do not administer
457(b)	Yes	We do not administer
501(c) Non-Profit	Yes	We do not administer
529 Plan	Yes	We do not administer
Defined Benefit Plan	Yes	Case-by-case basis
Keogh (HR-10) Plan	Yes	Case-by-case basis
Money Purchase Plan	Yes	Case-by-case basis
Profit-Sharing Plan	Yes	Case-by-case basis
SEPP 72(t)/ SEPP 72(q)	Yes	We do not administer
Traditional IRAs		
Rollover IRA (Traditional)	Yes	
Custodial IRA	Yes	
Inherited IRA	Yes	
Nondeductible IRA/Taxable IRA	Yes	We do not administer
Self-Directed IRA	Yes	
SEP IRA	Yes	We do not administer
SIMPLE IRA	Yes	We do not administer

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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	
Backdoor Roth IRA	No	
Designated Roth/Roth 401(k)	Yes	We do not administer
Inherited Roth IRA	Yes	
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	Case-by-case and could need additional documentation for suitability review
Charitable Remainder Annuity Trust	Yes	Case-by-case and could need additional documentation for suitability review
Charitable Remainder Trust	Yes	Case-by-case and could need additional documentation for suitability review
Charitable Remainder Unitrust	Yes	Case-by-case and could need additional documentation for suitability review
Corporation	Yes	Case-by-case and could need additional documentation for suitability review
Irrevocable Trust	Yes	Case-by-case and could need additional documentation for suitability review
Family Limited Partnerships	Yes	Case-by-case and could need additional documentation for suitability review
Revocable Trust	Yes	Case-by-case and could need additional documentation for suitability review
Special Needs Trust	Yes	Case-by-case and could need additional documentation for suitability review

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Net Income with Make-up Charitable Remainder Unitrust	Yes	Case-by-case and could need additional documentation for suitability review
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