|  |  |  |
| --- | --- | --- |
| **Fund Type** | **YES or NO** | **Notes** |
| Non-Qualified Money | **Yes** |  |
| Non-Qualified  Stretch | **No** | The Standard does not do non-spousal qualified stretches either. |
| 401(a) | **No** |  |
| 401(k) | **Yes** | Must identify who can act on behalf of the plan. Note: Standard does not offer flexible premium annuities. |
| 403(b)/TSA Plan/  Roth 403(b) | **No** |  |
| 457(b) | **No** |  |
| 501(c) Non-Profit | **Yes** | Must identify who can act on behalf of the charity. |
| 529 Plan | **No** |  |
| Defined Benefit Plan | **Yes** | Must identify who can act on behalf of the plan. Note: Standard does not offer flexible premium annuities. |
| Keogh (HR-10)  Plan | **Yes** |  |
| Money Purchase Plan | **Yes** | Must identify who can act on behalf of the plan. Note: Standard does not offer flexible premium annuities. |
| Profit-Sharing Plan | **Yes** | Must identify who can act on behalf of the plan. Note: Standard does not offer flexible premium annuities. |
| SEPP 72(t)/ SEPP 72(q) | **No** |  |
| **Traditional IRAs** | | |
| Rollover IRA  (Traditional) | **Yes** | Note: Standard does not offer flexible premium annuities. |
| Custodial IRA | **Yes** | Note: Standard does not offer flexible premium annuities. |
| Inherited IRA | **No** |  |
| Nondeductible  IRA/Taxable IRA | **Yes** | Note: Standard does not offer flexible premium annuities. |
| Self-Directed IRA | **Yes** | Note: Standard does not offer flexible premium annuities. |
| 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) | **No** |  |
| Backdoor Roth IRA | **Yes** |  |
| Designated  Roth/Roth 401(k) | **Yes** | Must identify who can act on behalf of the plan. |
| Inherited Roth IRA | **No** |  |
| Self-Directed  Roth IRA | **Yes** |  |
| Spousal Roth IRA  (Living spouse assumes deceased spouse’s Roth IRA.) | **Yes** |  |
| **Ownership** | | |
| Charitable Lead  Annuity Trust | **Yes** | The Standard is a product provider only. We offer no specialized administration. |
| Charitable Remainder Annuity  Trust | **Yes** | The Standard is a product provider only. We offer no specialized administration. |
| Charitable Remainder Trust | **Yes** | The Standard is a product provider only. We offer no specialized administration. |
| Charitable Remainder Unitrust | **Yes** | The Standard is a product provider only. We offer no specialized administration. |
| Corporation | **Yes** | Must identify who can act on behalf of the corporation. |
| Irrevocable Trust | **Yes** |  |
| Family Limited Partnerships | **Yes** |  |
| Revocable Trust | **Yes** |  |
| Special Needs Trust | **Yes** |  |
| Net Income with Make-up Charitable  Remainder Unitrust | **Yes** | The Standard is a product provider only. We offer no specialized administration. |