

## The Standard

### Funding Acceptance Chart for Legend Financial Marketing Services

Fund Type	YES or NO	Notes
Non-Qualified Money	<b>Yes</b>	
Non-Qualified Stretch	<b>No</b>	The Standard does not do non-spousal qualified stretches either.
401(a)	<b>No</b>	
401(k)	<b>Yes</b>	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)	<b>No</b>	
457(b)	<b>No</b>	
501(c) Non-Profit	<b>Yes</b>	Must identify who can act on behalf of the charity.
529 Plan	<b>No</b>	
Defined Benefit Plan	<b>Yes</b>	Must identify who can act on behalf of the plan. Note: Standard does not offer flexible premium annuities.
Keogh (HR-10) Plan	<b>Yes</b>	
Money Purchase Plan	<b>Yes</b>	Must identify who can act on behalf of the plan. Note: Standard does not offer flexible premium annuities.
Profit-Sharing Plan	<b>Yes</b>	Must identify who can act on behalf of the plan. Note: Standard does not offer flexible premium annuities.
SEPP 72(t)/ SEPP 72(q)	<b>No</b>	
<b>Traditional IRAs</b>		
Rollover IRA (Traditional)	<b>Yes</b>	Note: Standard does not offer flexible premium annuities.
Custodial IRA	<b>Yes</b>	Note: Standard does not offer flexible premium annuities.
Inherited IRA	<b>No</b>	
Nondeductible IRA/Taxable IRA	<b>Yes</b>	Note: Standard does not offer flexible premium annuities.
Self-Directed IRA	<b>Yes</b>	Note: Standard does not offer flexible premium annuities.

## The Standard

### Funding Acceptance Chart for Legend Financial Marketing Services

SEP IRA	<b>Yes</b>	
SIMPLE IRA	<b>No</b>	

Fund Type	YES or NO	Notes
<b>Roth IRAs</b>		
Roth IRA	<b>Yes</b>	
Roth IRA Conversion (Full)	<b>Yes</b>	
Roth IRA Conversion (Partial)	<b>No</b>	
Backdoor Roth IRA	<b>Yes</b>	
Designated Roth/Roth 401(k)	<b>Yes</b>	Must identify who can act on behalf of the plan.
Inherited Roth IRA	<b>No</b>	
Self-Directed Roth IRA	<b>Yes</b>	
Spousal Roth IRA <small>(Living spouse assumes deceased spouse's Roth IRA.)</small>	<b>Yes</b>	
<b>Ownership</b>		
Charitable Lead Annuity Trust	<b>Yes</b>	The Standard is a product provider only. We offer no specialized administration.
Charitable Remainder Annuity Trust	<b>Yes</b>	The Standard is a product provider only. We offer no specialized administration.
Charitable Remainder Trust	<b>Yes</b>	The Standard is a product provider only. We offer no specialized administration.
Charitable Remainder Unitrust	<b>Yes</b>	The Standard is a product provider only. We offer no specialized administration.
Corporation	<b>Yes</b>	Must identify who can act on behalf of the corporation.
Irrevocable Trust	<b>Yes</b>	
Family Limited Partnerships	<b>Yes</b>	
Revocable Trust	<b>Yes</b>	

## The Standard

### Funding Acceptance Chart for Legend Financial Marketing Services

Special Needs Trust	<b>Yes</b>	
Net Income with Make-up Charitable Remainder Unitrust	<b>Yes</b>	The Standard is a product provider only. We offer no specialized administration.