

Funding Acceptance Chart for Legacy Marketing Group® Fixed Index Annuities

Fund Type	Americo Financial Life and Annuity Insurance Company	Ameritas Life Insurance Corp.	Integrity Life Insurance Company	Standard Insurance Company
Non-Qualified Money	Yes	Yes	Yes	Yes
Non-Qualified Stretch	No (Spousal or Non-Spousal)	No (Spousal or Non-Spousal)	Yes (No Expanse Rider)	No (Spousal or Non-Spousal)
401(a)	No	Yes (No GLWB)	Yes (Annuitant must be the beneficial employee. Plan documents required.)	Yes (For existing 401(a).) No (For new 401(a).)
401(k)	No	Yes (No GLWB)	Yes (Annuitant must be the beneficial employee. Plan documents required.)	Yes (As a funding vehicle only; no plan administration.)
403(b)/TSA Plan/ Roth 403(b)	Yes (Non-Contributory only; loans not available. In California, 403(b) transfers into new 403(b) annuity contracts are not accepted.)	No	No	No
457(b)	No	Yes (No GLWB)	No	No
501(c) Non-Profit	Yes	No	Yes	Yes
529 Plan	No	No	No	No
Defined Benefit Plan	No	No	Yes (Section 401 plans only. Annuitant must be the beneficial employee. Plan documents required.)	Yes
Keogh (HR-10) Plan	No	No	No	No
Money Purchase Plan	No	No	Yes (Section 401 plans only. Annuitant must be the beneficial employee. Plan documents required.)	No
Profit-Sharing Plan	No	No	Yes (Section 401 plans only. Annuitant must be the beneficial employee. Plan documents required.)	Yes
SEPP 72(t)/ SEPP 72(q)	No	No	Yes (Both new and inforce. Requires calculation or substantiated quote. No Expanse Rider.)	No
Reverse Mortgage/Home Equity Line	No (Carrier will consider if the funds are not used to purchase the annuity.)	No (Carrier will consider if the funds are not used to purchase the annuity.)	No (Carrier will consider if the funds are not used to purchase the annuity.)	No (Carrier will consider if the funds are not used to purchase the annuity.)

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Traditional IRAs				
Rollover IRA (Traditional)	Yes	Yes	Yes	Yes
Custodial IRA	No	Yes	Yes	Yes
Inherited IRA	No (Spousal or Non-Spousal)	No (Spousal or Non-Spousal)	Yes (Eligible beneficiaries only. No Expanse Rider.)	No (Spousal or Non-Spousal)
Nondeductible IRA/Taxable IRA	No	No	Yes	No
Self-Directed IRA	No	No	Yes	No
SEP IRA	Yes	Yes	Yes	Yes
SIMPLE IRA	No	Yes	No	No
Roth IRAs				
Roth IRA	Yes	Yes	Yes	Yes
Roth IRA Conversion (Full)	Yes	Yes	Yes	Yes
Roth IRA Conversion (Partial)	No	No	No	No
Backdoor Roth IRA	No	No	Yes	No
Designated Roth/Roth 401(k)	No	No	Yes	No
Inherited Roth IRA	No	No	Yes (No Expanse Rider)	No
Self-Directed Roth IRA	No	No	Yes	No
Spousal Roth IRA (Living spouse assumes deceased spouse's Roth IRA.)	Yes	Yes	Yes	Yes
Ownership				
Charitable Lead Annuity Trust	No	No	No	No
Charitable Remainder Annuity Trust	No	Yes	Yes (Legal review required. Trust determines Expanse Rider eligibility.)	No
Charitable Remainder Trust	Yes (No Enhanced Death Benefit Rider)	Yes	Yes (Legal review required. Trust determines Expanse Rider eligibility.)	No
Charitable Remainder Unitrust	No	Yes	Yes (Legal review required. Trust determines Expanse Rider eligibility.)	No

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Ownership (cont'd)				
Corporation	Yes (No Enhanced Death Benefit Rider)	Yes	Yes (Legal review required. Trust determines Expanse Rider eligibility.)	Yes (Our Business Entity Resolution Certification form is required for legal review. If further legal review is needed, additional documentation may be required such as meeting minutes, corporate resolution, articles of incorporation or copy of business license.)
Limited Liability Company (LLC)	Yes (No Enhanced Death Benefit Rider)	Yes	Yes (Legal review required. Trust determines Expanse Rider eligibility.)	Yes (Our Business Entity Resolution Certification form is required for legal review. If further legal review is needed, additional documentation may be required such as meeting minutes, corporate resolution, articles of incorporation or copy of business license.)
Irrevocable Trust	Yes (No Enhanced Death Benefit Rider)	Yes	Yes (Legal review required. Trust determines Expanse Rider eligibility.)	Yes (Legal review required. Our Certification of Trust form is required along with title page and signature page of the Trust.)
Family Limited Partnerships	No	No	Yes (Legal review required. Trust determines Expanse Rider eligibility.)	No
Revocable Trust	Yes (No Enhanced Death Benefit Rider)	Yes	Yes (Legal review required. Trust determines Expanse Rider eligibility.)	Yes (Legal review required. Our Certification of Trust form is required along with title page and signature page of the Trust.)
Special Needs Trust	Yes (No Enhanced Death Benefit Rider)	Yes	Yes (Legal review required. Trust determines Expanse Rider eligibility.)	Yes (Legal review required. Our Certification of Trust form is required along with title page and signature page of the Trust. <i>Full Trust pages may be required if further legal review is needed.</i>)
Net Income with Make-up Charitable Remainder Unitrust	Yes (No Enhanced Death Benefit Rider)	Yes	Yes (Legal review required. Trust determines Expanse Rider eligibility.)	Yes (Legal review required. Our Certification of Trust form is required along with title page and signature page of the Trust. <i>Full Trust pages may be required if further legal review is needed.</i>)



For more information, call Legacy's Marketing Field Support Team at 800-395-1053, Ext. 4002, or your IMO.