

# Types of Retirement Plans

PLAN NAME	STATUS	RISK TOLERANCE	CAN PLAN ROLL INTO AN ANNUITY?
401(K) - "K" PLANS	QUALIFIED	HIGH RISK	YES
TRADITIONAL IRA	QUALIFIED	FROM HIGH TO LOW RISK	YES
403(B) - "B" PLANS	QUALIFIED	HIGH RISK	YES
ROTH IRA	QUALIFIED	FROM HIGH TO LOW RISK	YES
SEP IRA	QUALIFIED	FROM HIGH TO LOW RISK	YES
CASH BALANCE PLAN	QUALIFIED	FROM HIGH TO LOW RISK	YES
DEFINED BENEFIT PLAN	QUALIFIED	LOWER RISK	YES
SIMPLE IRA	QUALIFIED	LOWER RISK	YES
PROFIT SHARING PLANS	QUALIFIED	FROM HIGH TO LOW RISK	YES

## FREEDOM EQUITY GROUP

FEG does not give tax advice - please consult a tax professional

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PLAN NAME	STATUS	RISK TOLERANCE	CAN IT ROLL INTO AN ANNUITY?
NON-QUALIFIED DEFERRED COMPENSATION PLANS	NON-QUALIFIED	HIGH RISK	NO
PENSION	QUALIFIED	LOWER RISK	YES
ESOPS	QUALIFIED	HIGH RISK	YES
TSP	QUALIFIED	FROM HIGH TO LOW RISK	YES
457 (B)	NON-QUALIFIED	FROM HIGH TO LOW RISK	YES
CASH VALUE LIFE INSURANCE	QUALIFIED OR NON-QUALIFIED	LOWER RISK	YES
INCOME ANNUITIES	QUALIFIED OR NON-QUALIFIED	LOWER RISK	YES

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