

Retirement Guide

Legacy SCL Caregivers



Getting Started

Congratulations! We're excited to help you step into this new phase in your life. Below you will find information that will guide you along the way.

Intermountain 401(k) Plan

When you leave Intermountain Health, T. Rowe Price will automatically send you a termination kit in the mail. If you are interested in moving your 401(k) funds, please contact T Rowe Price at 800-922-9945. You will have the following options:

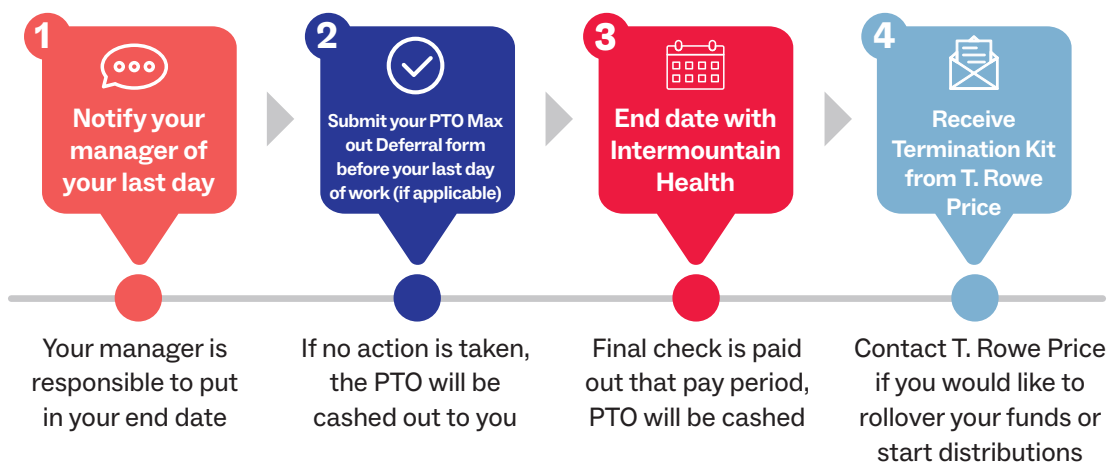
- **Leave your savings in the plan**
- **Rollover your account**
- **Take your savings out now.** The Intermountain Retirement Program and T. Rowe Price are here to help you with your transition to retirement. Here are some additional resources:
 - > **General account questions.** Call T. Rowe Price at 1-800-922-9945 Monday through Friday from 5 a.m. to 8 p.m.
 - > **Online resources.** Log in to the myRetirementPlan website at rps.troweprice.com.
 - > **General retirement questions.** Call AskHR at 1-801-442-7547 Monday through Friday from 8 a.m. to 5:30 p.m.



PTO Max Out Deferral Form

When you leave Intermountain Health, you have the option to roll your PTO into your Intermountain 401(k) with T. Rowe Price. If you choose to have your PTO contributed to the 401(k), please complete the form and return it to the Retirement Department prior to your last day of work. If you would like your PTO to be cashed out to you, there is no action needed. Typically, PTO is cashed out/contributed to the 401(k) 2 weeks after your last check.

Please see a timeline below.



Retirement Resources



Intermountain Retirement Program

Customer Service for your retirement benefits is handled through AskHR at 1-801-442-7547 or via email at AskHR@imail.org. You can also visit intermountainhealthcare.org/retiree for up-to-date information about your Intermountain retirement benefits.

HealthEquity

HealthEquity is the administrator for Health Savings Accounts for Intermountain. Their customer service team is available 24 hours day/ 7 days/week at 1-866-346-5800.

WEX

WEX is the COBRA Administrator for Intermountain. They can be reached at 866-451-3399. If you have COBRA questions before you retire, please contact Intermountain COBRA Services at 1-801-442-2263.

Via Benefits

Via Benefits offers benefits solutions for retirees and employees. They can assist you with enrolling in health insurance or shop for Medicare. Contact them at discoverviabenefits.com or by calling 1-855-803-2540 Monday-Friday, 8:00 am-7:00 pm ET.

Social Security and Medicare

If you have questions about your Social Security benefit, visit their website at ssa.gov or call them at 1-800-772-1213.

Generally, after age 65, Medicare Part A and Part B become your primary health insurance provider. If you don't sign up for Medicare Part B during your initial enrollment period, you may have to pay extra for your Medicare Part B premium. You may wish to explore coverage under a Medicare Part D plan for prescription drug coverage. For more information, visit their website at www.medicare.gov or call them at 1-800-MEDICARE or 1-800-633-4227.