



INTERMOUNTAIN RETIREMENT PROGRAM PTO & LTI Maximum Deferral Form

To maximize your 401(k) contribution using paid time off (PTO) and long-term illness insurance (LTI), complete the personal information and check one of the two boxes below.

Name: _____

Employee number: _____

Phone number: _____

- I wish to contribute ALL* of my PTO and LTI into my 401(k) (pretax basis), up to the annual maximum deferral limit set by the IRS.

OR

- I wish to contribute a specific percentage to the 401(k) (pretax basis) (up to a maximum of 100%). _____%

This form must be received by Retirement PRIOR TO YOUR LAST DAY OF WORK.

Last day at Intermountain: _____

Participant signature: _____ Date: _____

Please attach this form to the Pension case you opened in PensionConnect by logging in to <https://intermountain.ehr.com>. If you do not have a Pension benefit or are deferring your benefit, you may return this form by emailing it to RetirementOps@imail.org.

Annual Maximum Contribution Limits

Beginning January 1, 2024, the annual maximum deferral limit for someone over the age of 50 is the lesser of \$30,500/year or 100%* of your pay. This limit is combined across the 401(k) and 403(b) plans.

*FICA and other benefit deductions will occur first.