Truist Momentum: Teammate FAQs

Get answers to your questions about how to participate, earn rewards, log in, reset password, and more.

- Registration instructions
- Common questions
- Truist Momentum savings account process

New Momentum participants

Who can participate?
Teammates of Truist and participating subsidiaries who are scheduled to work 20 hours or more per week are eligible to participate in Truist Momentum. New hires can enroll the week after their start date.

If you're a Truist intern, temporary, or contract worker you aren't eligible for financial well-being dollars, but you can participate in the program. Use the family registration code, TRUISTFAMILY, when creating your account.

How do I log in/register?
Visit TruistMomentum.com to log in or register.

– If you're new to Truist Momentum, register with the following information:
  - Click on the "Create Account" button on the Truist Momentum registration page.
  - Enter your first and last name.
  - Enter your registration code: **TRUISTTEAMMATE** (one word, not case sensitive).
  - Enter your work email address (don't use your personal email address).
    - Your username is your email address.
  - Confirm your work email address.
  - Create a unique password.
    - Passwords must contain at least eight characters, one upper case letter, one lower case letter, one number, one symbol and cannot repeat any character more than twice in a row. You cannot use your current ID.
  - Accept the "Terms of Use Agreement" and the "Truist Teammate Terms and Conditions."
  - Click the purple "Register" button at the bottom of the page.

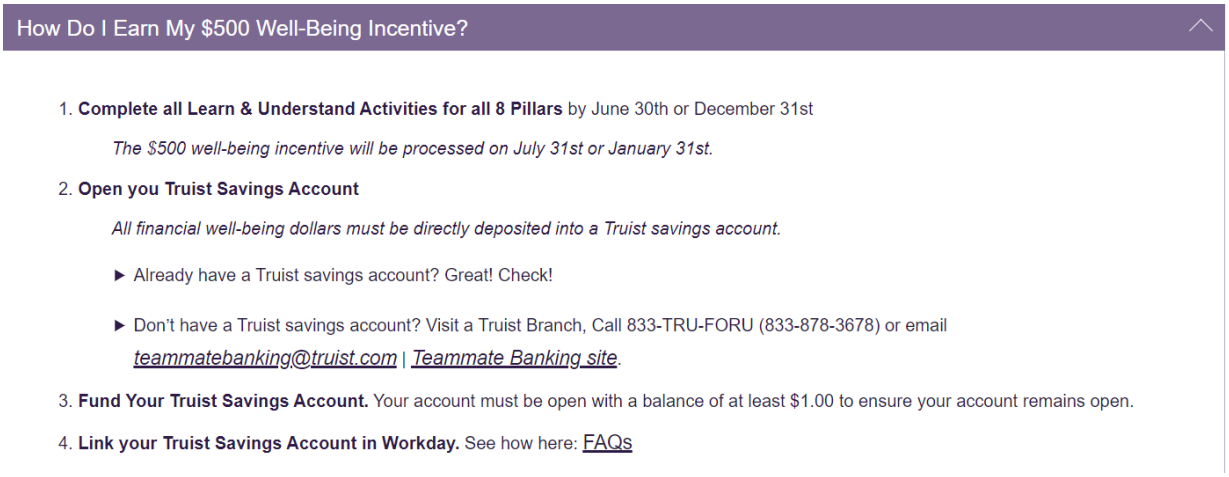
© 2023 Truist Financial Corporation. Truist, the Truist logo and Truist Purple are service marks of Truist Financial Corporation.

I have family members who would benefit from this program. Can they access Truist Momentum?
Yes, teammates' family members can register for Truist Momentum by using the registration code **TRUISTFAMILY** and following the instructions on the registration page. Only Truist teammates, though, are eligible to receive financial well-being dollars.

I am new to Truist Momentum, how do I earn the $500 financial well-being dollars?
The $500 is earned by completing all Learn & Understand activities for all 8 Pillars by the deadline (June 30 or December 31) to be eligible for the payout (July 31 or January 31).

Expand the to do list under each pillar to complete each item under the Learn & Understand section. Your progress will populate automatically as you finish watching the videos and completing the modules.

How do I know I've completed the requirements to receive my financial well-being dollars?
Click the drop-down arrow in the light purple bar at the top of the Truist Momentum home page titled "How Do I Earn My $500 Well-Being Incentive?". Make sure you've completed all 4 items by the program deadline. If you've completed all of them successfully you will be eligible to earn your incentive at the next available pay-out date (Jan 31 or July 31st).



How will I receive the financial well-being dollars I earned for completing Truist Momentum?
The financial well-being dollars will be deposited into your Truist savings account at time of payout if all the program requirements are met by the deadline. See these instructions below for how to open a Truist savings account and link it to Truist Momentum in Workday.

A Truist savings account must be open and linked to Truist Momentum in Workday at the time of payout. Teammates opening new accounts to receive Truist Momentum financial well-being dollars should follow all established rules for new accounts. A new account that's opened and not funded within 60 days will be closed automatically. If the account is closed at the time of payout, teammates will have to reopen an account and wait until the next payout date to receive financial well-being dollars. If the account number changes, please be sure to update it in Workday.

TRUIST

Updated June 2025

© 2023 Truist Financial Corporation. Truist, the Truist logo and Truist Purple are service marks of Truist Financial Corporation.

Do my financial well-being dollars have to be deposited into a Truist savings account?
Yes, all financial well-being dollar rewards must be directly deposited into a Truist savings account. Teammates without a Truist savings account can open one at a Truist branch, online, or by phone. Teammates can email teammatebanking@truist.com, visit Teammate Banking or call 833-TRU-FORU (833-878-3678), Monday – Friday, 8 am to 6 pm ET.

Why do my financial well-being dollars have to be deposited into a Truist savings account?
As a financial institution, we have the unique ability to provide all teammates with a free savings account and walk them through the account opening process. Behavioral research proves that individuals will be more likely to save money that's put directly into a savings account.

When will I receive my financial well-being dollars after completing all program requirements?
The financial well-being dollars will be processed on July 31 and January 31. See payout timeline below:

Program period	Deadline	Payout date
Jan. 1 – June 30	June 30	July 31
July 1 – Dec. 31	Dec. 31	Jan. 31

Note: This is a one-time incentive.

If I complete all program requirements earlier than the program deadline, can I receive my financial well-being dollars early?
No, financial well-being dollars are processed on the last payroll cycle of the payout month (July or December).

I completed the program requirements by the deadline, but I didn't receive financial well-being dollars. What do I need to do to get this corrected?
– Verify the following information:
  - ✓ Completed all Learn & Understand activities for all 8 Pillars by the deadline.
  - ✓ Your Truist savings account is open, funded, and linked to Truist Momentum in Workday by the deadline.

If you've verified all the information above and it is correct, call Teammate Care at 800-716-2455 Monday-Friday 8am to 5pm ET or complete a ServiceNow request for administrative help.

What happens if I complete all program requirements by the deadline, but leave the company before the payout?
You must be an active teammate on the day of the payout to receive the financial well-being dollars. Unfortunately, if you decide to leave Truist, you won't be eligible for the payout.

If you retire, are part of a reduction in force, or divestiture, you'll receive any incentive owed in following month end payroll cycle from your termination date.

TRUIST

© 2023 Truist Financial Corporation. Truist, the Truist logo and Truist Purple are service marks of Truist Financial Corporation.

Can I earn $500 this year if I completed the program last year?
No, you can receive the Truist Momentum incentive only once. If you've previously completed the program requirements and received the incentive you, can earn 100 points for completing My Annual Progress Checklist under the CarePlus Mobile Health Points Program.

How do I earn 100 points under the CarePlus Mobile Health Points Program?
Go to CarePlus Mobile Health and attest that you've completed all items in your Annual Progress Checklist to receive 100 points.

Where do I go if I have more questions?

– If you have questions about the Truist Momentum program, eligibility, or payout questions, you can call Teammate Care at 800-716-2455 Monday-Friday 8am to 5pm ET or complete a ServiceNow request.

  Note: Due to the verification process and program audits, we are not able to confirm you have completed all the program requirements for the incentive payout until after the program deadline.

– If you have technical questions about your Truist Momentum account, send an email to support@truistmomentum.com.

TRUIST

Updated June 2025

© 2023 Truist Financial Corporation. Truist, the Truist logo and Truist Purple are service marks of Truist Financial Corporation.

Truist Momentum savings account process

All financial well-being dollar rewards must be directly deposited into a Truist savings account.

Note: Financial well-being dollars are subject to all taxes and withholding orders and aren't included in 401(k) or pension wages. They also aren't included in your benefits annual rate (BAR) calculation.

Click here for the direct deposit and savings account guide.

Eligible savings accounts:

- Traditional Savings Accounts: **Must be marked as "savings" in Workday** (These accounts ***don't*** have checks.)
  - Regular Savings
  - Truist One Savings
  - E-Savings (E-Savings is set up online and is the same as a regular savings.)
- Savings Accounts with Check Writing: **Must be marked as a "checking" account in Workday.**
  - Money Rate Savings
  - Investor Deposit
  - Truist Money Market
  - Wealth Money Market
  - High Performance Money Market

1. Verify you have completed all Learn & Understand activities for all 8 Pillars by the deadline (June 30 or December 31).

2. If you have a Truist savings account, you can move on to step 3. If you do not have a Truist savings account you can open one at a Truist (branch, online, or by phone). You can email teammatebanking@truist.com, visit Teammate Banking or call 833-TRU-FORU (833-878-3678), Monday – Friday, 8 am to 6 pm ET.

3. Set up your Truist savings account in Workday.
   - Add your Truist savings account to the list of accounts in the payments elections.
     - Select the **Pay** icon from the Workday homepage.
     - Select **Payment Election**s within the Direct Deposit menu (located on the right side of the screen).
     - Click **Add** at the bottom of the Accounts section.
       - *This step isn't necessary if you have an existing Truist savings account in Workday.*

TRUIST

Updated June 2025

© 2023 Truist Financial Corporation. Truist, the Truist logo and Truist Purple are service marks of Truist Financial Corporation.

- Complete the Account Information fields.
    - Routing Transit Number
    - Bank Name
    - Account Type
        - Checking (if the account has checks)
        - Savings (if the account doesn't have checks)
- Click **Ok** - The accounts section now includes your newly added account.

- You must maintain a balance of at least $1 to ensure your account remains open. Otherwise, it will be closed automatically in 60 days, and you won't be eligible to receive the financial well-being dollars.

4. Set up your direct deposit of at least $20 per month ($10 per payroll cycle) from your regular payroll into your emergency savings account (Pillar 1). If you're already contributing monthly/semi-monthly to a savings account, you can move on to step 5.
    - Click **Edit** under Payment Elections – same page.
        - You may need to use the scroll bar to see the Edit button.
    - Click the **+** in the upper left corner of the Payment Elections section.
    - Complete the following fields:
        - Country: Select United States of America [*Currency will then populate as USD]
        - Payment Type: Select Direct Deposit
        - Account: Click the account field to display a list of available accounts
        - Balance / Amount: Disburse (Allocate) your total pay among all the accounts you have added for Payment Elections.
            - Amount: specific dollar amount to be deposited ($20+)
            - Balance: remainder of funds not otherwise allocated among other accounts
                - The Balance account must be the last account in your list of Payment Elections. Use the Order arrows to rearrange accounts as needed.
    - Click **OK.**
        - Account changes take effect immediately. Payroll processes several days before each payday. If you make changes after payroll has been processed, your changes won't take effect until the following payroll is processed.

5. Direct your financial well-being dollars reward to your Truist savings account in Workday.
    - Under Payment Elections Requiring Setup click **Add** on the Truist Momentum row.
        - The Distribution column will default to "Balance."

Note: *Participation in the Truist Momentum program is voluntary. To receive the $500 financial well-being dollars, teammates must complete the following: all Learn & Understand activities for all 8 Pillars and a Truist savings account must be open, funded, and linked to Truist Momentum in Workday by the program deadline (June 30 or December 31) to be eligible for the payout (July 31 or January 31).*

All financial well-being dollar rewards must be directly deposited into a Truist deposit account. *Teammates without a Truist savings account can open one at a Truist branch, online, or by phone. Teammates can email teammatebanking@truist.com, visit Teammate Banking, or call 833-TRU-FORU (833-878-3678), Monday – Friday, 8 am to 6 pm EST.*

© 2023 Truist Financial Corporation. Truist, the Truist logo and Truist Purple are service marks of Truist Financial Corporation.