

## 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](#)
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## 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](https://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.

## 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 My Progress Checklist Phase 1 and Phase 2 by the deadline (June 30 or December 31) to be eligible for the payout (July 31 or January 31).

You must check all items in the teammate checklist to earn financial well-being dollars. Your progress for watching the videos and modules will populate automatically upon completion.

## How do I know if I have 100% completed the program?

When you log into Truist Momentum, you'll see three bars for your My Progress Checklist near the top of the screen. Each bar shows the percentage and date of completion if the phase is 100% completed. You can also click to expand and see what activities you need to complete before the deadline. The completion date must be **before the deadline** to be eligible for the payout.

### My 8 Pillars

My Progress Checklist Phase 1	100% Completed on 3/23/2021	▼
My Progress Checklist Phase 2	100% Completed on 3/23/2021	▼
My Annual Progress Checklist	20% Completed.	▼

## 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.

## 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](mailto:teammatebanking@truist.com), visit [Teammate Banking](#) or call 833-TRU-FORU (833-878-3678), Monday – Friday, 8 am to 6 pm ET.



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**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 phase 1 and phase 2?**

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 phase 1 and phase 2 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 phase 1 and phase 2 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:
  - ✓ Your teammate ID (found in Workday, the number next to your name) and registration code is correct in TruistMomentum.com under your Profile/My Account.
  - ✓ Completed phase 1 and phase 2 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, email [wellbeing@truist.com](mailto:wellbeing@truist.com) for administrative help.

**What happens if I complete phase 1 and phase 2 activities 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 for the payout.

If you retire or are part of a reduction in force or divestiture, you’ll receive any incentive owed within 30 days of your termination date.



**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 (phases 1 and 2) 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.

**I previously registered for Truist Momentum, but I used my personal email address and/or I entered the wrong teammate ID when I registered, what do I do?**

Go to [TruistMomentum.com](#) and under your Profile/My Account you can update your email address and/or your teammate ID. You can find your Truist teammate ID in Workday – it's the number next to your name.

**Where do I go if I have more questions?**

- If you have questions about the Truist Momentum program, eligibility, or payout questions, send an email to [wellbeing@truist.com](mailto:wellbeing@truist.com).
- If you have technical questions about your Truist Momentum account, send an email to [support@truistmomentum.com](mailto:support@truistmomentum.com).



## 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.

### 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

Click here for how to [set up direct deposit and link it to your savings account](#):

1. Verify your teammate ID is correct on [TruistMomentum.com](https://TruistMomentum.com).
  - Go to [TruistMomentum.com](https://TruistMomentum.com) and under your Profile/My Account you can view or update your teammate ID.
  - You can find your Truist teammate ID in Workday – it's the number next to your name.
  - If you don't have a teammate ID showing under the “My Account” page in [TruistMomentum.com](https://TruistMomentum.com), add your Truist teammate ID in the “New ID,” and “Confirm New ID” fields.
  - Click the “Change ID” button and confirm your correct teammate ID is now showing in the “Current ID” field.
2. If you have a Truist savings account, you can move on to step 3. If you don't have a Truist savings account you can open one at a Truist (branch, online, or by phone). You can email [teammatebanking@truist.com](mailto:teammatebanking@truist.com), visit [Teammate Banking](#) or call 833-TRU-FORU (833-878-3678), Monday – Friday, 8 am to 6 pm ET.



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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 Elections** 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.*
    - 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.”

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**Note:** Participation in the Truist Momentum program is voluntary. In order to receive the \$500 financial well-being dollars, teammates must complete the following: My Progress Checklist for Phase 1, My Progress Checklist for Phase 2, 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](mailto:teammatebanking@truist.com), visit [here](#) or call 833-TRU-FORU (833-878-3678), Monday – Friday, 8 am to 6 pm EST.

