

Truist Momentum: Teammate FAQs

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

- [Registration instructions](#)
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New Momentum participants

How do I log in/register?

Visit TruistMomentum.com to log in or register.

- If you are 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. Please note that only Truist teammates are eligible to receive financial well-being dollars.

I am new to Truist Momentum, how do I earn the \$750?

The \$750 is earned in two installments by completing phase 1 and phase 2. Here's how you can earn your reward:

- You can earn \$400 for completing "My Progress Checklist Phase 1" on TruistMomentum.com, located in the purple bars at the top of the "My 8 Pillars" page.
 - ✓ Tip: You must check all the radio buttons to earn financial well-being dollars. Your progress for watching the videos and modules will automatically populate upon completion.
- You can earn an additional \$350 for completing "My Progress Checklist Phase 2" on TruistMomentum.com, located in the purple bars at the top of the "My 8 Pillars" page.

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 percent of completion and the 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 at the end of each quarter. The completion date must be **before the quarterly deadline** in order to be eligible for that quarter's 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 phase 1 and/or phase 2?

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.

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. Please note that new accounts opened and not funded within 60 days will be automatically closed. If the account is closed at the time of payout for Truist Momentum financial well-being dollars, teammates will have to reopen an account and wait until the next quarterly payout to receive their Truist Momentum financial well-being dollars. If the account number changes, please be sure to update the account number listed in Workday.



Updated March 2023

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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 [here](#) or call 833-TRU-FORU (833-878-3678), Monday – Friday, 8 am to 6 pm EST.

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 of providing all teammates with a free savings account and walking them through the account opening process. Behavioral research proves that individuals will be more likely to save money that is put directly into a savings account.

When will I receive my financial well-being dollars after competing phase 1 and/or phase 2?

The quarterly payouts will be processed the first month of each quarter (Jan., April, July, and Oct.), as the program can be completed anytime during the year. See payout timeline below:

	Deadline	Payout
Q1	March 31	April 30
Q2	June 30	July 31
Q3	September 30	October 31
Q4	December 31	January 31

Note: You can receive only one phase payout per quarter.

If I complete phase 1 and/or phase 2 earlier than the program deadline, can I receive my financial well-being dollars early?

No, financial well-being dollars are paid on the last payroll cycle of the payout month (Jan., April, July, and Oct.).

I completed phase 1 and/or phase 2 by the quarterly deadline, but I did not receive financial well-being dollars. What do I need to do to get this corrected and receive financial well-being dollars?

- Verify the following information:
 - ✓ Your Teammate ID (found in Workday, the number beside your name) and registration code is correct in TruistMomentum.com under Account Settings.
 - ✓ Completed phase 1 and/or phase 2 by the quarterly deadline.
 - ✓ Your Truist savings account is open, funded, and linked to Truist Momentum in Workday by the quarterly deadline.

If you've verified all the information above and it is correct, email wellbeing@truist.com for administrative help.



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What happens if I complete phase 1 or phase 2 activities by the deadline, but leave the company before the payout?

Unfortunately, if you decide to leave Truist, you won't be eligible to receive the financial well-being dollars. You must be an active teammate on the day of the payout to receive the financial well-being dollars.

Note: If you retire, are part of a reduction in force, or a divestiture you will receive any incentive owed within 30 days from your term date.

Can I earn \$750 this year if I completed the program last year?

No, you can only receive the \$750 incentive once. If you have 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 the "account settings" page on TruistMomentum.com to update your email address and/or your teammate ID. You can find your Truist teammate ID in Workday – it is the number beside 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.
- If you have technical questions about your Truist Momentum account, send an email to 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.
 - Go to “account settings” on TruistMomentum.com to view or update your teammate ID.
 - You can find your Truist teammate ID in Workday – it is the number beside your name.
 - If you don't have a teammate ID showing on the account settings page in 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, visit [here](#) or call 833-TRU-FORU (833-878-3678), Monday – Friday, 8 am to 6 pm EST.



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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 will not 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 of 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. Teammates who have previously completed the SunTrust Momentum onUp program may complete the Truist Momentum program but aren't eligible for additional financial well-being dollars. In order to receive the \$750 in total financial well-being dollars, teammates must complete the following program requirements: My Progress Checklist for Phase 1 to earn \$400, My Progress Checklist for Phase 2 to earn \$350, and a Truist savings account must be open, funded, and linked to Truist Momentum in Workday by the quarterly deadline in order to be eligible for that quarter's payout.

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 [here](#) or call 833-TRU-FORU (833-878-3678), Monday – Friday, 8 am to 6 pm EST.



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