

Workplace Financial Wellness:

Because your employees' financial wellness
is critical to your business success



Financial stress affects lives

58%

...of Americans feel like they are living paycheck to paycheck¹

27%

...have no savings whatsoever²

60%

...of Americans, could not handle a **\$1,000** unexpected expense³

For the first time in history, most Americans don't believe the next generation will have better opportunities than they did⁴



*What does Financial
Wellness have to do with
your organization?*

Financial stress hurts your business

Financial issues are **the number one cause of workplace stress**⁵

Employees spend an average of 28 hours per month **worrying about their finances while at work**⁶

That costs companies \$5,000 per employee a year in lost productivity⁶

It's worrying that...

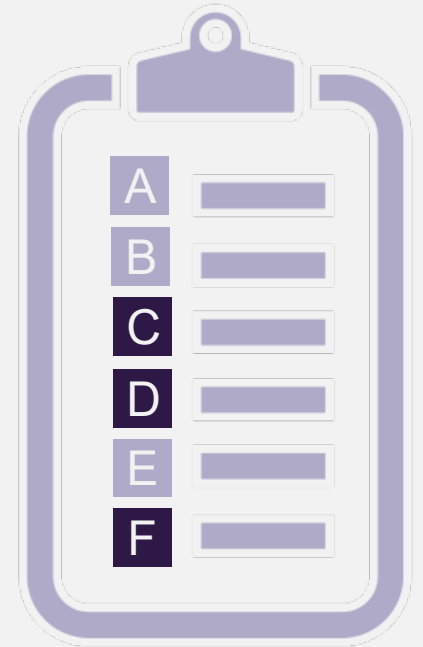
70%

...of employees believe their employer has little concern for their financial well-being⁷

How well do you understand personal finance?

In other words...

If you were to grade yourself on your knowledge about money—what **GRADE** would that be?



A man and a woman are looking at a laptop screen. The man is wearing glasses and has a beard. The woman is pointing at the screen. The background is a solid purple color.

Half of Americans give themselves grades of “**C,**” “**D,**” or “**F**” on their knowledge of personal finance¹

The research shows that, “**fights over money is the #1 cause of divorce.**”¹

Why?

8 out of 10 people identify money as a **significant source** of stress in their lives.²

Regardless of income
58% of Americans are living paycheck to paycheck.³

Sneak Peak!

We'll help your employees to...



Pillar 1

ESTABLISH
an emergency
savings account



Pillar 2

ORGANIZE
and automate
their finances



Pillar 3

BREAK
financial bonds
and barriers



Pillar 4

TAKE CARE
of "What if?"



Pillar 5

INVEST
for happiness now
and in the future



Pillar 6

MAKE
home the heart
of money matters



Pillar 7

MAXIMIZE
their money-making
machine



Pillar 8

GET PERSPECTIVE
by giving back

Ignite

Interactive financial wellness program



Self directed learning

- Holistic Financial Education
- Automated Budgeting Tool
- Free Credit Score Tracking
- 1:1 Financial Coaching



Instructor led training

- Real time streaming
- Classroom training
- Webinars



Hard copy materials

- Books & workbooks
- Audio books

Leading your employees to financial confidence

99.5%

...of participants would recommend Truist Momentum to others. Here's why:

1. Participants who live by a budget:



Before:

43%

After:

87%

Change:

+102%

3. The number of participants who knew their net worth increased by:



Before:

21%

After:

94%

Change:

+348%

2. Participants with an Emergency Savings Account:



Before:

68%

After:

98%


Change:

+44%


4. Participants increased their investment contributions by an average of:



+35%



As a country, we
are going in the wrong
direction when it comes
to managing our money



If we would like the world
to change in some way,
**we must first expect that
change from ourselves**

Interested in Learning More for Your Organization?

Email Ben Appel at
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Thank You

