

This spring, Truliant awarded more than \$20,000 in scholarships to high school seniors who are pursuing higher education at either a college, university or community college. Truliant offers three types of scholarships: the **Fred J. Sarda Scholarship**, a merit-based scholarship for Truliant member-owners; the **Clyde Padgett Scholarship**, a merit-based scholarship for dependents of Truliant staff or volunteers; and the **Carolinas Credit Union Foundation Scholarship**, open to members of any credit union in the Carolinas. All are \$1,000 scholarships.



Jordan Rierson is the daughter of Shawn Rierson, Card Services Specialist at Truliant. Jordan is the 2021 recipient of the **Clyde Padgett Scholarship** and graduated from West Stokes High School in King this June. Jordan will attend UNC Charlotte this fall to study Special Education.



Nine of our 20 scholarship recipients are pictured above.  
 Top row, left to right: Joanne Matalaka, Lindsay Melton, Kylie Sparks.  
 Middle row, left to right: Kareena Gor, Johnathan Pack, Taleen Hanna.  
 Bottom row, left to right: Jaylen Roope, Talia Penn, Caleb Miller.

### **Fred J. Sarda** **Scholarship Recipients**

- Eva Bean  
*Virginia Tech*
- Layah Clinton  
*UNC Chapel Hill*
- Kareena Gor  
*Vanderbilt University*
- Taleen Hanna  
*Mercer University*
- Sarah Houlden  
*UNC Charlotte*
- Lilly Lasarsky  
*NC State University*
- Cameron Locklear  
*Lees-McRae College*

- Elle Lyons  
*UNC Chapel Hill*
- Joanne Matalaka  
*Appalachian State University*
- Lindsay Melton  
*NC State University*
- Caleb Miller  
*Cedarville University*
- Johnathan Pack  
*NC State University*
- Talia Penn  
*Duke University*
- Claire Polito  
*UNC Chapel Hill*
- Jaylen Roope  
*UNC Chapel Hill*

- Aurora Rose  
*Warren Wilson College*
- Lauren Smith  
*Furman University*
- Kylie Sparks  
*UNC Chapel Hill*
- Sarah Stewart  
*UNC Chapel Hill*
- Caroline Wyrick  
*Roanoke College*
- Carolinas Credit Union**  
**Foundation Scholarship**
- Robert Grubbs  
*Catawba College*

# Economic Mobility

Strengthening organizations that build financial stability and social prosperity.



**Benevolence Farm**, in Graham, NC, was built on the premise of mercy and sincere belief in second chances. Their mission is to cultivate leadership, promote sustainable livelihoods, and reap structural change with individuals (particularly women) impacted by the criminal justice system in North Carolina. They provide a transitional employment and living program to teach these women, among other things, how to understand their finances and build credit. This spring, the Truliant Foundation made a charitable grant to support the women cultivating food from raised vegetable gardens, which were then given to low-income families living in food deserts in Alamance County.



In April, Truliant donated to the **Black Philanthropy Initiative (BPI)** in Winston-Salem, a program of the Winston-Salem Foundation. Launched in 2007, BPI invests in and supports local programs and issues affecting black communities in Forsyth County. Through its BPI Impact Grants, the organization helps grassroots nonprofit organizations with budgets of less than \$150,000.



Don Jackson, Truliant's Small Business Administration (SBA) Director spoke recently during a virtual networking event in June with the **Latin American Chamber of Commerce (LACCC)**.

Jackson explained how SBA loans work and answered questions posed by Charlotte attendees.



In April, as part of Financial Literacy Month, Truliant highlighted the Asset Building Coalition of Forsyth County's work during its Triad Today special on ABC45. **The Asset Building Coalition of Forsyth County** is a group of nonprofits, government, volunteers and businesses who are all building awareness about asset poverty in Forsyth County, where, according to a *Prosperity Now* report, "nearly half of the households of color cannot afford to cover basic expenses such as housing, transportation or childcare."



**“ Nearly half of the households of color cannot afford to cover basic expenses such as housing, transportation or childcare. ”**

Truliant was a founding member of this group, which advocates for livable wages, saving funds and mitigating the benefits cliff in the county.



The **Guilford Urban Farming Initiative (GUFI)** works to grow local and urban agriculture in an effort to improve community health and reduce health disparities in Guilford County. The organization addresses food insecurity by providing access to fresh produce and vegetables grown by black farmers to urban communities and neighborhoods in Greensboro, NC. Truliant's Community Engagement department worked with Executive Director Paula Sieber this spring to connect her with grant opportunities for her nonprofit and for black farmers.

# Community Development

Supporting organizations that cultivate relationships, social responsibility, civic engagement and collaboration.

Truliant hosted a Community Shred Day in Wytheville on June 5, in partnership with the **Wytheville-Wythe-Bland Chamber of Commerce** and the Town of Wytheville. The event was held at the Wytheville Municipal Building, and Shred-It provided the shredding services. More than 10,000 pounds of paper were shredded on-site, with nearly 125 cars passing through during the four-hour event.



In May, Truliant Community Affairs team member Renee Rohrer spoke to Forsyth County Sheriff Bobby Kimbrough on his “Off the Cuffs” podcast about the Credit Union’s financial education and its support of nonprofits. Sheriff Kimbrough is committed to helping his staff establish and maintain good credit, and understand homeownership and the power of credit.



This spring, Truliant made a charitable grant to the **High Point Chamber Foundation** to support a new program, the Congdon Yards Community

Talks. The new program, expected to launch this fall, will feature speakers from across the High Point community aimed at educating and engaging the entire community. Truliant will open a new High Point location on Main Street later this fall.



Truliant’s Huntersville team participated in the **Huntersville Regional Chamber** Kindness Day on May 3. The chamber created the Kindness Day to encourage chamber members, such as Truliant, to participate in random acts of kindness throughout the day. Huntersville staff handed out cups and goodies to member-owners who visited the branch. Truliant is an active member of the Huntersville Regional Chamber of Commerce.



On May 21, 1865, a Union cavalry chaplain came to St. Philips Moravian Church in Salem, NC (now Winston-Salem) and declared “all persons held as slaves are free.” This was one month prior to the June 19, 1865. We know this date today as Juneteenth. Truliant celebrated Juneteenth this year with a gift to support the Hidden Town Initiative and African American history at **Old Salem**, home to St. Philips Moravian Church, the oldest standing African American church in North Carolina. Learn more about Old Salem and Hidden Town Initiative here. <https://www.oldsalem.org/core-initiatives/hidden-town-project/>

# Youth & Education

**Sustaining education and programming for middle and high school students.**

Truliant recently provided a donation to support **Holston High School** in Damascus, VA, where Truliant opened a branch in January 2021. The school had significant equipment needs this year, and Truliant's gift purchased new projectors and new science lab equipment.

In June, Truliant provided a charitable grant to Classroom Central in Charlotte, to provide school supplies to students in need specifically in Gaston County. Classroom Central's focus is on supporting teachers with supplies they need for their classrooms, and students who are at-risk due to homelessness, foster care or are receiving public assistance.



In April, in celebration of Financial Literacy Month, Truliant and Jonathan Permar, Director of Social Studies for **Guilford County Schools**, were guests on the Greensboro Chamber's impact: the **BORO** podcast, discussing the new Economics and Personal Finance mandatory course for all high school students. The new course, approved in 2019, includes lessons in economics, income in education, money and credit management, financial planning and consumerism. According to a 2020 report from the National Foundation on Credit Counseling, 62 percent of all US adults carry credit card debt, and 1 in 4 adults do not pay all of their bills on time. Focusing on these topics helps better prepare students to break that trend. The new course begins fall 2022.



# Recognition & Service



Veronica Calderon, Truliant's Senior Vice President of Diversity, Inclusion and Equity, recently joined the Board of Directors at **Financial Pathways of the Piedmont** in Winston-Salem. Veronica is also a board member of the **Latin American Chamber of Commerce and Communities in Schools Charlotte-Mecklenburg**.



Jeff Hibbard, Truliant's Senior Vice President of Digital Experience & Business Transformation, was recently named Board Secretary and Chair of the Marketing Committee for **Crosby Scholars Community Partnership** in Winston-Salem.

# Financial Wellness

Assisting organizations that promote and improve financial inclusion and financial literacy.



Rolando Miranda

Truliant began a series of financial wellness webinars this spring with **Latin American Coalition** in Charlotte. The series offers webinars, in both English and Spanish, for families who students are in one of the Latin American Coalition's programs. Charlotte mortgage loan officer Rolando Miranda led the Spanish-speaking programs on budgeting and credit.



**Women's Resource Center**  
in Alamance County

In May, Truliant provided a financial wellness workshop to the **Women's Resource Center (WRC) of Alamance County**, whose mission is to

empower women to improve and enrich their lives. The May webinar was part of a year-long series Truliant is providing to the nonprofit's more than 375 women in the Burlington area.

## GREER RELIEF

EVERY NEIGHBOR MATTERS

This summer, Truliant led two financial wellness workshops with **Greer Relief**, a nonprofit near Truliant's Pelham Road location in the Greenville, SC market that "transforms neighbors in need to neighbors who thrive." The two programs, *Stretching Your Food Dollar* and *First Time Homebuyers*, were created for families in the Christmas Morning Shoppe program, where families receive gifts for their children for Christmas after they attend required classes on topics such as health, wellness and finances.

## Investing in Communities

Truliant invests in local communities through a variety of programs, including:

*Scholarships* support high school seniors entering an accredited college, community college or university beginning fall semester annually.

*Community Mini Grants* fund programming and capacity-building initiatives for nonprofit organizations.

*Financial Education Grants* encourage public school teachers, grades 6-12, to incorporate financial education lessons in their curriculum.

*Charitable Contributions* offer timely gifts of support to nonprofit organizations throughout the year.

*Community Sponsorships* provide investment in local communities to support specific events, programs or date-specific opportunities or partnerships.

*Employee Volunteerism* allows staff to volunteer their time, talent and passion with schools or organizations of their choosing.

*Board Involvement* matches Truliant's leaders and expertise with local nonprofit organizations in an effort to strengthen nonprofit organizations.

*Government Policy and Advocacy* positions Truliant as a voice for our member communities and other credit unions in key policy and political activity.

## #trucommunity

Truliant's mission is to improve the lives of our members and become their preferred financial institution. To learn more about Truliant Federal Credit Union's community engagement program, or to apply for a grant, sponsorship or charitable contribution, please visit: <http://www.truliantfcu.org/about-us/community> or send an email to [community@truliantfcu.org](mailto:community@truliantfcu.org).

