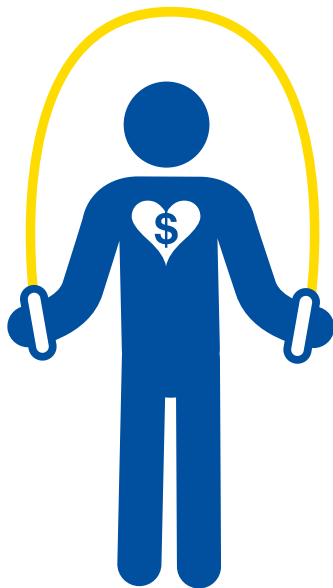


Financial Wellness Program Guide

Financially healthy employees are productive, engaged and successful. Let Truliant at Work help you improve financial health in your organization.



Complimentary Services

- Financial Education Visits
- Lunch and Learn Workshops
- One-on-One Financial Checkups
- Employer Onboarding
- Wellness Fairs

Our programs are now online!
We are currently offering webinars, remote one-on-one financial checkups and more!





Designed as a complimentary supplement to employee wellness programs, Truliant at Work provides employee-focused workshops, onsite activities and one-on-one sessions to encourage a productive, engaged and successful workforce.



■ One-on-One Financial Checkups

We'll meet with your employees privately, in 30-minute increments, for a checkup that includes a credit report review, including credit score. This popular program often uncovers savings for employees like ways to consolidate debt, lower monthly payments and more.

■ Onsite Educational Tools

Truliant At Work's onsite educational tools can be customized to fit your company's, and employees', needs. They include financial education seminars, one-on-one financial checkups and access to online financial literacy for offsite employees.

In addition to great rates, free checking and the latest in mobile banking, Truliant operates 30+ locations and provides financial wellness onsite for more than 1,000 companies.

Stay Financially Fit



Our financial fitness seminars and workshops are all designed to improve employees' financial fitness.

Sessions include:

■ Building a Better Budget

A budget is a powerful tool, and the first step, in establishing financial control. Participants will identify goals and we'll help them design a realistic budget that encourages them to spend smart, and save smarter.

■ Money Habitudes

Our money habits and attitudes constantly influence our lives. Understanding your tendencies and behaving accordingly can help you reach your goals. In this session, we will talk through content and activities to gain a better understanding of our money personality type.

■ Identity Theft

This presentation provides an overview of common identity theft practices, tools for preventing identity theft, and specific steps for victims to take to minimize the damage.

■ Solving the Mystery of Credit

Credit reports and scores affect the cost of credit we receive, where we live, insurance rates we pay—even the jobs we can get. By understanding the reporting and scoring process, you can establish, maintain and protect a strong credit history and good credit score.

Employee Wellness

“71% of employees with employer-provided services are using them to assist with personal finances, and that number has increased in recent years.”

– PwC’s 8th Annual Employee Financial Wellness Survey (2019 Results)



■ Access to Financial Advisors

Employees will also have access to a licensed and certified Truliant Financial Advisor, available through CUSO Financial Services, LP.* Advisors offer seminars and no-obligation private sessions to answer employees’ questions about financial planning, retirement, setting goals or their 401(k).


**Truliant
Financial Advisors**

Available through CUSO Financial Services, L.P.

*Non-deposit investment products and services are offered through CUSO Financial Services, L.P. ("CFS"), a registered broker-dealer (Member FINRA/SIPC) and SEC Registered Investment Advisor. Products offered through CFS: are not NCUA/NCUSIF or otherwise federally insured, are not guarantees or obligations of the credit union, and may involve investment risk including possible loss of principal. Investment Representatives are registered through CFS. The Credit Union has contracted with CFS to make non-deposit investment products and services available to credit union members.

Contact Us



Adding Truliant at Work to your employee benefits package makes your business stand out in the marketplace, and can help attract and retain the best, most loyal employees. Remember, there's no cost to add our program, no contracts to sign and no added administrative burdens!

[Click here to get started!](#)



Locations



Greater Charlotte and Surrounding Areas

Cornelius

21714 Catawba Ave., #6A
Cornelius, NC

Gastonia – Coming in Late July!

3351 East Franklin Blvd., Suite 106
Gastonia, NC

Greenville, SC

3621 Pelham Rd.
Greenville, SC

Harrisburg

4347 School House Commons
Harrisburg, NC

Huntersville

9706 Gilead Rd.
Huntersville, NC

Mallard Creek

3024 B Prosperity Church Rd.
Charlotte, NC

Matthews

324 North Trade St.
Matthews, NC

Mint Hill

7114 Brighton Park Dr., #300
Mint Hill, NC

Park Road

Branch and Commercial
Lending Office
4530 Park Rd., #110
Charlotte, NC

Shelby

621 S Dekalb St.
Shelby, NC

South End

2400 South Blvd., #102
Charlotte, NC

Steele Creek

14318 Rivergate View Dr., #300
Charlotte, NC

Tyvola

Truliant Tyvola Rd.
6051 Tyvola Glen Circle
Charlotte, NC

University

Truliant University
1915 Back Creek Dr.
Charlotte, NC

Waverly

7107 Waverly Walk Ave.
Charlotte, NC