Truist Investor Relations

Truist Wealth enhances portfolio of digital investing solutions with Truist Trade

Self-directed investing solution empowers clients with simple account opening, zero-commission trades

CHARLOTTE, N.C., Nov. 15, 2022 /PRNewswire/ -- Truist Wealth has enhanced its digital investing capabilities with Truist Trade, a new self-directed investing solution that allows clients to open select investment accounts and conduct online trading on their own.

"Our digital investing solutions are designed to meet clients at various points in their investment journey and help them build better lives," said Joseph M. Thompson, chief wealth officer at Truist. "Whether used to manage all or a portion of a portfolio, Truist Trade provides clients the added control of a self-directed account that is delivered by a seamless process from account opening through the trading experience."

An investor can open an individual brokerage or joint brokerage account, Roth IRA or traditional IRA on Truist.com. These investment accounts require no account minimum, offer commission-free trades for stocks, ETFs, and mutual funds, and may be viewed anytime and anywhere alongside other Truist accounts, providing clients a consolidated view of their finances. Clients also have access to a dedicated support team and a suite of research materials and tips to help inform their investment decisions.

Co-creation alongside clients fueled the development of Truist Trade. Designed for and with Truist clients, Truist Trade was developed in journey rooms using an iterative approach to product development at the Truist Innovation and Technology Center, which opened in June 2022.

"The launch of Truist Trade is another milestone on our journey to co-create a digital-first investment experience," said Sherry Graziano, head of digital and contact center banking for Truist. "Whether you're a casual trader or want the expertise and guidance of a Truist Wealth advisor, we're building and delivering solutions to help clients achieve their personal purpose."

Truist Trade builds on Truist Wealth's portfolio of digital investing solutions. Earlier this year, Truist introduced Truist Invest, a robo advisor, and Truist Invest Pro, a hybrid investment solution.

"Many investors want to construct and manage their portfolio on their terms and in ways that are convenient to them," said Kacy Howard, senior vice president of digital investing at Truist Wealth. "Truist Trade was developed with input from our clients to deliver an end-to-end experience that can complement our robo-advisory and hybrid investing solutions, as well as advisor-led relationships."

Truist Trade is offered by Truist Investment Services, Inc. Truist Invest and Truist Invest Pro are offered by Truist Advisory Services, Inc., a SEC registered investment adviser (registration does not imply that the SEC or another agency has sponsored, recommended or approved the firm based upon registration).

To learn more about Truist Trade, potential investors can visit: https://www.truist.com/investing-retirement/self-directed-investing.

About Truist Wealth
Truist Wealth delivers holistic wealth management solutions to affluent, high and ultra-high net worth individuals, families and business owners across the U.S. and abroad. Truist Investment Services, Inc. and Truist Advisory Services, Inc. are part of Truist Wealth. Truist Wealth is part of Truist Financial Corporation (NYSE: TFC), a purpose-driven financial services company committed to inspiring and building better lives and communities.

Banking products and services, including loans, deposit accounts, trust and investment management services provided by Truist Bank, Member FDIC. Securities, brokerage accounts, insurance/annuities offered by Truist Investment Services, Inc. member FINRA, SIPC, and a licensed insurance agency where applicable. Life insurance products offered by referral to Truist Insurance Holdings, Inc. and affiliates. Investment advisory services offered by Truist Advisory Services, Inc., Sterling Capital Management, LLC, and affiliated SEC registered investment advisers. Sterling Capital Funds advised by Sterling Capital Management, LLC. Learn more at Truist.com/wealth.

About Truist
Truist Financial Corporation is a purpose-driven financial services company committed to inspiring and building better lives and communities. Truist has leading market share in many high-growth markets in the country and offers a wide range of products and services through our retail and small business banking, commercial banking, corporate and investment banking, insurance, wealth management, and specialized lending businesses. Headquartered in Charlotte, North Carolina, Truist is a top 10 U.S. commercial bank with total assets of $548 billion as of September 30, 2022. Truist Bank, Member FDIC. Learn more at Truist.com.

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