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# Truist Wealth elevates the digital experience with a new modern, mobile forward investment account and portfolio platform

## Updated wealth platform focused on seamless client experience

**CHARLOTTE, N.C., December 10, 2025** – Truist Wealth, the private wealth business of Truist Financial Corporation (NYSE: TFC), is proud to announce a leap forward in its digital transformation journey, powered by InvestCloud, a global leader in wealth technology focused on delivering more meaningful outcomes for clients. This strategic partnership marks a key moment in Truist Wealth's multi-year investment to deliver a differentiated and client-centric digital experience.

Truist Wealth's enhanced platform brings a suite of advanced digital capabilities directly to clients' fingertips, including:

- Unified digital experience: Truist Wealth clients benefit from a modern, secure interface that is integrated into Truist Mobile Banking and Online Banking.
- Seamless and secure portfolio access: Clients enjoy access to their investment accounts and consolidated portfolio views, empowering them to manage their wealth with greater transparency and control.
- Self-directed trading: The platform enables clients who choose self-directed investment accounts to independently execute trades across equities, ETFs, mutual funds, and options.
- Advanced research tools: Integrated Truist Investment Advisory Group macroeconomic research, along with market research capabilities, equip clients to make confident investment decisions.

"Truist Wealth is focused on meeting clients where they are on their investment journeys," said **Heather Magaha, Head of Wealth Strategic Partnerships and Delivery for Truist Wealth**. "This investment is instrumental in delivering innovative digital solutions, enabling time-saving self-service features and enhancing the overall client experience."

The digital wealth solutions from InvestCloud unify data from multiple systems, providing clients with a holistic view of their financial lives, and self-directed trading capabilities support those who want to manage and execute trades. By simplifying financial management and enabling seamless digital engagement, Truist Wealth is unlocking new levels of convenience and personalization for its clients.

> “We’re proud to partner with Truist to deliver an inspired digital experience that supports clients at every stage of their wealth management journey,” said **Dan Bjerke, President, Digital Wealth at InvestCloud**. “This implementation highlights our joint commitment to innovation and a digital-first approach to client service.”

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**About Truist**
Truist Financial Corporation is a purpose-driven financial services company committed to inspiring and building better lives and communities. Headquartered in Charlotte, North Carolina, Truist has leading market share in many of the high-growth markets in the U.S. and offers a wide range of products and services through wholesale and consumer businesses, including consumer and small business banking, commercial and corporate banking, investment banking and capital markets, wealth management, payments, and specialized lending businesses. Truist is a top-10 commercial bank with total assets of $544 billion as of Sept. 30, 2025. Truist Bank, Member FDIC. Equal Housing Lender. Learn more at Truist.com.

**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 Wealth provides distinct solutions for individuals and businesses through the following affiliates: Banking products and services, corporate trust, escrow, and institutional investment management services to public, private, and nonprofit organizations provided by Truist Bank, Member FDIC. Securities, brokerage accounts, and/or annuities offered by Truist Investment Services, Inc., member FINRA, SIPC, and a licensed insurance agency. Investment advisory services offered by Truist Advisory Services, Inc. and affiliated SEC registered investment advisers.

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For more information please contact:

**TK Hall**
+617-834-7304 | media@truist.com

**[First name Name]**
+[xx xxx xxx xxx] | [email address]