

Game B: Truist Volunteer Panel Discussion

Recommended Number of Volunteers: 2+

Event Overview

A Truist panel discussion is a great way to give students insight into what it looks like to work in the financial and banking world. Students will have the opportunity to ask questions themselves.

Resources:

- Additional Tips and Tricks ([download here](#))
- Virtual Visit Best Practices ([download here](#))

Logistics:

- **Virtual:** Confirm that you have screen-sharing abilities in the meeting platform

3 minutes	Welcome Address/Kick-Off Students are settling into their seats
10 minutes	Truist Volunteer Introductions + Truist Intro Volunteers will share their name, role at Truist, role responsibilities, and what their first job was
20 minutes	Panel Discussion
10 minutes	Question and Answer Allow students to ask students about your role, careers at Truist, etc.
2 minutes	Farewell & Thank You Remarks

Run of Show

Welcome & Teammate Introductions (5 Minutes)

- Thank you for inviting us to join your classroom today! My name is [INSERT NAME]. I am joined by [INSERT ANY FELLOW TEAMMATES].
- [SHARE WHERE YOU LIVE, CURRENT ROLE AT TRUIST, WHAT YOU DO ON A DAILY BASIS IN LAYMAN'S TERMS, AND YOUR FIRST JOB AND THE BEST LESSON YOU LEARNED]
- [INTRODUCE ANY FELLOW TEAMMATES TO ALLOW THEM TO SHARE INFORMATION ABOUT THEMSELVES]

About Truist's Partnership (5 Minutes)

- Since the Truist Financial Foundation program began, we have provided financial education to over 1.5 MILLION students, just like you.
- At Truist, we believe that we can help our communities become better places to live. By doing that, we strive to help the people in those communities create strong futures.
- [SHARE A SHORT, PERSONAL ANECDOTE ABOUT HOW FINANCIAL EDUCATION, OR MONEY DECISIONS, INFLUENCED YOU PERSONALLY]
- We are so excited and honored to support the Financial Foundations program here at [INSERT SCHOOL NAME] to help support your financial futures!

Tips and Tricks:

- Remind students to be thinking of questions to ask at the end.
- If you feel comfortable, allow students to add you on LinkedIn to help them begin to build a professional network

Run of Show

Guided Panelist Discussion (20 minutes)

Suggested questions (Feel free to pick and choose which questions resonate most with you and your teammates. Feel free to add your own questions!)

Career-Focused

- What's one habit that you think has been helpful in growing as a professional?
- What are some roles within a financial institution that do not require a finance/business/math background but perhaps more of a creative background.
- What is one thing you wish you knew when you started your career?
- Do you have advice on how to find great jobs? (networking, LinkedIn, jobsites, Etc.)
- What do you look for in a prospective company when determining if you want to work there?
- What is the most rewarding part of your job? What is the most challenging?
- It can be intimidating to start building work experience and carving your professional path. What advice do you have for students who are just getting started with their careers?
- Can you tell us how you got started in your career and what inspired you to choose a career in the financial services industry?

Finance-Focused

- What would you say are the benefits of opening a checking account at a bank?
- What types of questions should students ask when opening a checking account?
- Can you give students some tips on how to set up a successful monthly budget plan?
- What things should students consider when choosing their first credit card?
- What steps could students do right now to help prepare for financing college?
- What is one piece of advice you would give to the students ahead of graduation?

Open Student Q&A (10 minutes)

We would now like to open the floor up to any questions you may have. These can be questions about future careers, our jobs at Truist, or follow-up questions you have about the Truist Financial Foundation course.

Students may be shy at first, but remind them that you are there to help them. If they don't have any questions, feel free to talk a little bit more about your career and share advice.

Wrap Up & Thank You (2 minutes)

Thank you for inviting us to join your classroom today. We are so excited and honored to have had the chance to share a bit of our own career journeys and advice with you today. At Truist, we believe that we can help our communities become better places to live. By doing that, we strive to help the people in our communities create strong futures.