How to add your bank account to your TIAA Brokerage Account

Once you've taken these steps, you can easily transfer money between your bank account(s) and your TIAA Brokerage Account(s) online.

**STEP 1**

1. Enter your TIAA USER ID and PASSWORD and click LOG IN.

![Log into your TIAA account](image)

**STEP 2**

1. Click Brokerage from within the Account snapshot.

![Account snapshot](image)

*As of the previous close. Select the account to see real-time balances.*
STEP 2 (continued)

Click the TRANSFER FUNDS button at the top of the page.

STEP 3

Click Add External Account to add your bank. Click Next.

Note: Use the scroll bar to select from the existing banks that may be file.
STEP 4
Path 1: Financial institution

Click in the Select or search field. Select the name of your financial institution from the list or enter the bank name in the search field.

Click NEXT.

If your bank’s name cannot be found, click VERIFY ANOTHER WAY and skip to Path 2: Account type, starting on page 5 of these instructions.

Path 1: Financial institution

Enter your online banking USERNAME and PASSWORD.

RE-ENTER PASSWORD to confirm.

Click NEXT.

If you’re unable or unwilling to provide this information, click VERIFY ANOTHER WAY and skip to Path 3: Test deposits, starting on page 6 of these instructions.
**STEP 4 (continued)**

Your financial institution may require additional security step(s).

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**Path 1: Financial institution**

Select the account to link.

Click **NEXT**.

When you see the confirmation screen, you’ve completed the process.

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If you’re unable or unwilling to provide this information, click **VERIFY ANOTHER WAY** and skip to **Path 3: Test deposits**, starting on page 6 of these instructions.
If you can’t find your financial institution, or are unable or unwilling to provide your online banking security information, or the system cannot verify your account, you will be taken to **Path 2: Account type**.

### STEP 4 (continued)

**Path 2: Account type**

Select the account type. Enter your institution’s **ROUTING NUMBER** and your **ACCOUNT NUMBER**. The name of your institution will appear under the **ROUTING NUMBER** as confirmation.

Click NEXT.

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If you’re unable or unwilling to provide this information, click **VERIFY WITH TEST DEPOSITS**.
STEP 4 (continued)
Path 3: Test deposits

Click VERIFY WITH TEST DEPOSITS.

We were unable to verify your account
Let's try another way to verify your financial institution account.
Select verify with test deposits below and we'll confirm your ownership by making two small deposits to your financial institution account. We'll send you an email with instructions on what to do next. Typically, this takes 1-2 business days. You also have the option to start over by selecting add a different account.

ADD A DIFFERENT ACCOUNT  VERIFY WITH TEST DEPOSITS CANCEL

ADD AN ACCOUNT

We've started test deposit verification
- We will confirm your account by sending two small deposits to your BANK OF AMERICA, NA account.
- This typically takes 1-2 business days.
- Once you receive the test deposits, you'll have 30 days to verify the amounts.

RETURN TO ACCOUNT SELECTION  GO TO TIAA.ORG

Path 3: Test deposits

When you see the confirmation screen, you’ve completed the process.
You’ll receive an email 1-2 business days later. Follow the instructions in the email to complete the process.