TIAA BROKERAGE

Streamline your trading by easily transferring money between accounts.

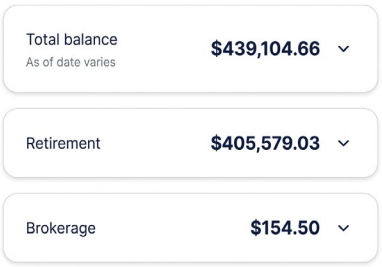
TIAA Wealth Management

Moving money into and out of your brokerage account is quick and easy when you link one or more bank accounts.

Getting started

STEP 1

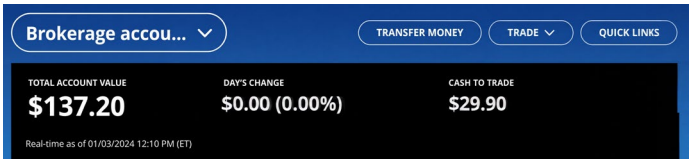
Log in to your **tiaa.org** account, select **Brokerage**, and navigate to your account.



STEP 2

Select **Transfer Money** at the top of the page.

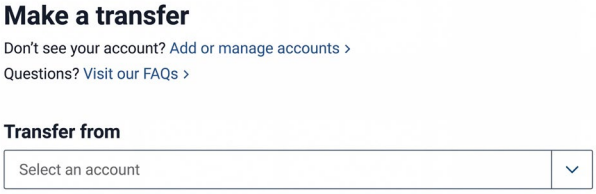
Note: For new accounts, select Fund Account.



STEP 3

Select **Add or manage accounts**.

Note: Use the drop-down menu to select from the existing banks that may already be available.



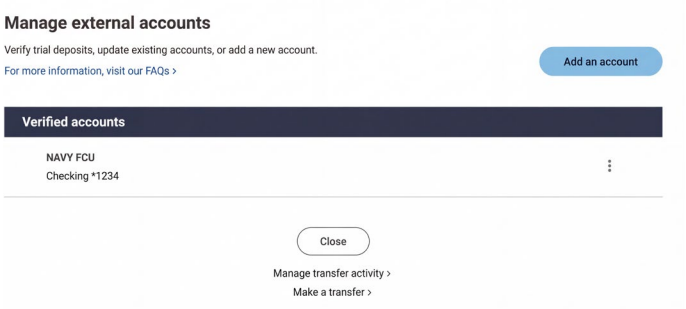
Adding your account

The quickest way to add your bank account is to use your online banking information to verify your account. If your bank isn't already verified, you'll be able to add an account using your information. If you're unable to verify using your online banking information, you'll be provided an opportunity to verify another way.

Getting started

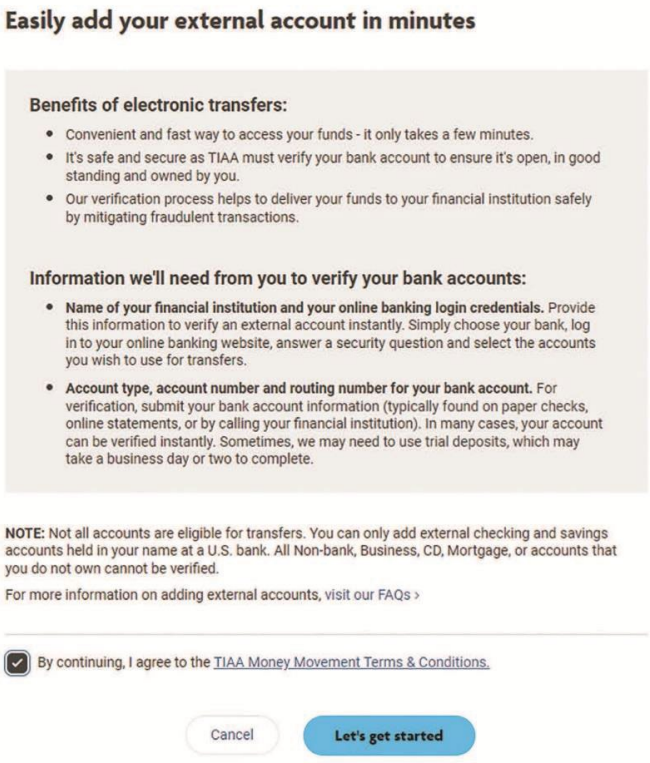
STEP 1

Click the **Add an account** button.



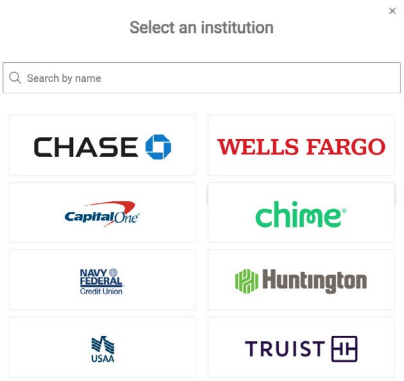
STEP 2

Review the items you'll need to add a bank account, click the check box to agree to the Terms & Conditions, and click **Let's get started**.



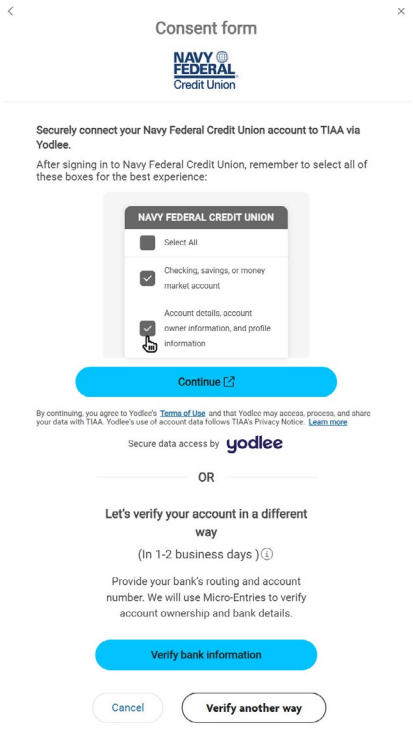
STEP 3

Select or enter the name of the bank you'd like to add. Select **Verify another way** to manually enter your bank information.



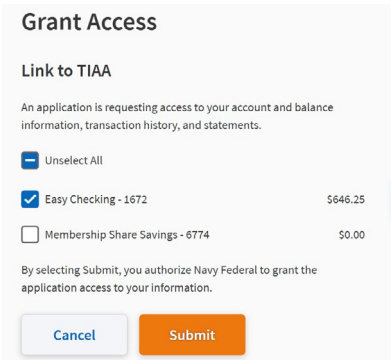
STEP 4

The next screens vary by bank. You'll follow the prompts on the screen to enter your online banking credentials, select **Submit**, and enter any additional security information your bank may require, such as two-step verification or security questions.



STEP 5

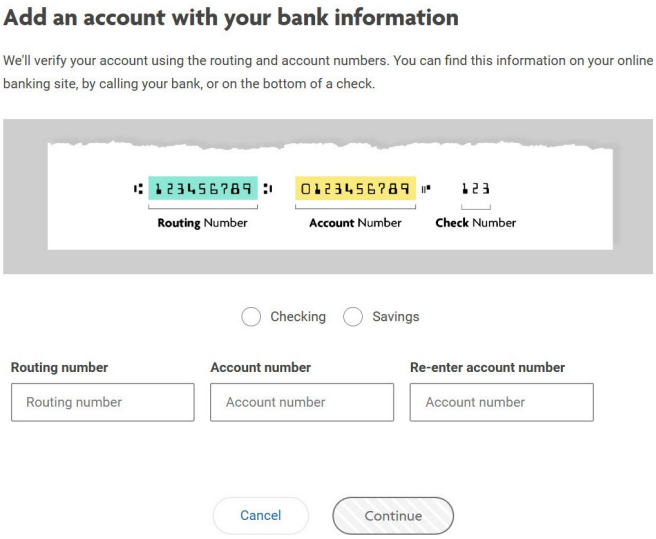
Select the accounts(s) you'd like to link and you're all set.



Manually enter your bank information

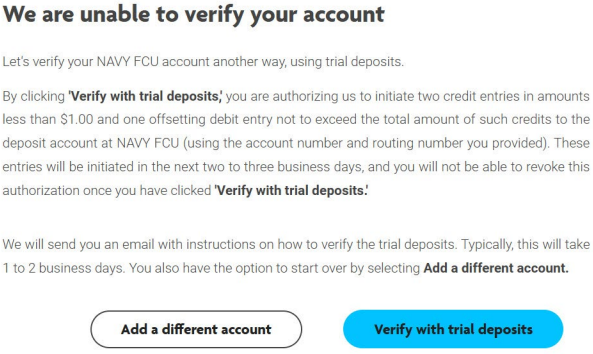
STEP 1

Select account type and enter your institution's information. Click **Continue** to verify the account.



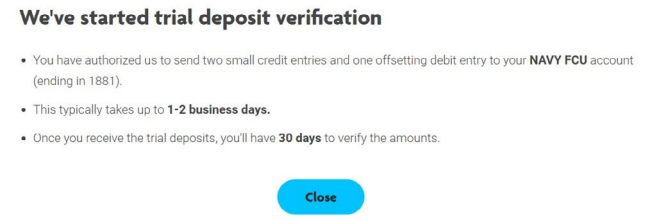
STEP 2

Select **Verify with test deposits**, if we're unable to verify your account right away.



STEP 3

Once the **test deposit verification** has started, you'll receive an email within 1 to 2 business days with instructions to complete the process.



Questions

Call TIAA Brokerage at **800-842-2252**, weekdays, 8 a.m. to 8 p.m. (ET).

TIAA Wealth Management

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