LINK A BANK ACCOUNT TO YOUR BROKERAGE ACCOUNT

Streamline your trading by easily transferring money between accounts

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

Getting started

1. Log in to your TIAA.org account and select Brokerage.

2. Select Transfer Money at the top of the page.
   
   **Note:** For new accounts, select Fund Account.

3. Select + Add External Account.
   
   **Note:** Use the scroll bar 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’s name isn’t listed in the “Select or search” field, select Verify Another Way and skip to the “Manually enter your bank information” section on page three.

**Log in to a known account**

1. Select or enter the name of the bank you’d like to add.

2. Enter your online banking credentials, select next, and enter any additional security information your bank may require, such as two-step verification or security questions.

3. Select the account you’d like to link and you’re all set.
Manually enter your bank information

1. Select account type and enter your institution’s information.

2. Enter your online banking credentials and you’re all done. If you’re not able to enter your credentials, select **Verify With Test Deposits**.

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

Call Brokerage at 1-800-927-3059, Monday through Friday, 8 a.m. - 7 p.m. (ET).