Getting started

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

Note: For new accounts, select Fund Account.

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

Note: Use the scroll bar to select from the existing banks that may already be available.

3. Select + Add External Account.

Tell us how you'd like to set up your transfer
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 “Search by name” 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 submit, and enter any additional security information your bank may require, such as two-step verification or security questions.

3. Select the account(s) 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.

Add your account with your bank information
Let’s verify your account using routing and account numbers. These can be found at your online banking site, by calling your bank, or on the bottom of your check.

Log into Bank ABC to verify your account
What happens to my login information?
This is a secure login and a one-time request only. We don’t save your information.

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

Add a reminder to your calendar to complete the verification process.
Questions?

Call Brokerage at 1-800-842-2252, Monday through Friday, 8 a.m. - 7 p.m. (ET).