

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, select **Brokerage** and navigate into your account.

View all: [INVESTMENTS](#) → [STATEMENTS](#) → [RETIREMENT TRANSACTIONS](#) →

1	+ Brokerage	\$124.11*
	+ Retirement	\$357,551.75 <small>+\$2,943.76 SINCE 12/31/2022</small>
	+ Other TIAA products	\$21,821.08
	+ Outside accounts in 360° Financial View	\$47.37

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

Note: For new accounts, select **Fund Account**.

Brokers account... ▾

2 TRANSFER MONEY TRADE ▾ QUICK LINKS ▾

TOTAL ACCOUNT VALUE	DAY'S CHANGE	CASH TO TRADE
\$137.20	\$0.00 (0.00%)	\$29.90

Real-time as of 01/03/2024 12:10 PM (ET)

3. Select **Add or manage accounts**.

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

3

Make a transfer

Don't see your account? [Add or manage accounts](#) >
Questions? [Visit our FAQs](#) >

Transfer from

Select an account ▾

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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.

Add an account

1. Click the **Add an account** button.

Manage external accounts
Verify trial deposits, update existing accounts, or add a new account.
For more information, visit our FAQs >

1 Add an account

Verified accounts

NAVY FCU	
Checking *1234	

Close

Manage transfer activity >
Make a transfer >

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**.

Easily add your external account in minutes

Benefits of electronic transfers:

- Convenient and fast way to access your funds - it only takes a few minutes.
- It's safe and secure as TIAA must verify your bank account to ensure it's open, in good standing and owned by you.
- Our verification process helps to deliver your funds to your financial institution safely by mitigating fraudulent transactions.

Information we'll need from you to verify your bank accounts:

- **Name of your financial institution and your online banking login credentials.** Provide this information to verify an external account instantly. Simply choose your bank, log in to your online banking website, answer a security question and select the accounts you wish to use for transfers.
- **Account type, account number and routing number for your bank account.** For verification, submit your bank account information (typically found on paper checks, online statements, or by calling your financial institution). In many cases, your account can be verified instantly. Sometimes, we may need to use trial deposits, which may take a business day or two to complete.

NOTE: Not all accounts are eligible for transfers. You can only add external checking and savings accounts held in your name at a U.S. bank. All Non-bank, Business, CD, Mortgage, or accounts that you do not own cannot be verified.

For more information on adding external accounts, visit our FAQs >

2 By continuing, I agree to the [TIAA Money Movement Terms & Conditions](#).

Cancel Let's get started

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

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.

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

Select an institution

3 Search by name

BANK OF AMERICA

WELLS FARGO

CHASE

Capital One

Account login

NAVY FEDERAL Credit Union

Username

Password

By continuing, you agree to [Yodlee's Terms of Use](#) for account linking. Your application provider's privacy notice applies to our handling of your data.

4 Submit

On behalf of TIAA data access provided by Yodlee

Cancel Verify another way

Linked external accounts

Select from your FCU accounts below to add to your list of external accounts.

Account	Status
<input checked="" type="checkbox"/> Savings *1234	Available to add
<input type="checkbox"/> Checking *1234	Cannot be added

5 Next >

[Add a different account >](#)

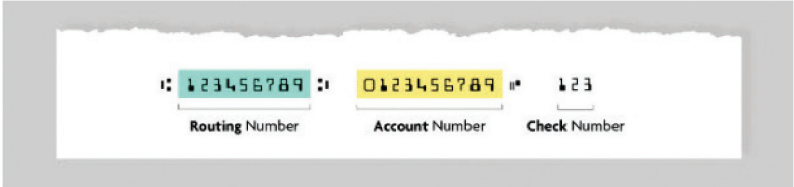
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Manually enter your bank information

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

Add an account with your bank information

We'll verify your account using the routing and account numbers. You can find this information on your online banking site, by calling your bank, or on the bottom of a check.



Checking Savings

Routing number: 256074974
Account number: 1231231529
Re-enter account number: 1231231529

NAVY FCU

Cancel **1** Continue

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

We are unable to verify your account

Let's verify your NAVY FCU account another way.

Select **Verify with test deposits** below and we'll confirm ownership by making two small deposits to your NAVY FCU account. We'll send you an email with instructions on how to proceed. Typically, this will take 1 to 2 business days. You also have the option to start over by selecting **Add a different account**.

Add a different account **2** Verify with test deposits

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.

We've started test deposit verification

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

3 Close

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Questions?

Call TIAA Brokerage at **800-842-2252**, weekdays, 8 a.m. to 7 p.m. (ET).



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