

## Existing Brex Connection Walkthrough

Brex allows one connection per Treasury Central Connect profile at a time. Before adding any additional accounts to your existing connection, please contact your Stifel Bank Treasury Management Team to request removal of the current connection. Once completed, disconnect your Stifel Bank accounts in Brex and reconnect, ensuring all accounts are selected.

### Disconnecting Existing Stifel Bank Feed

1. In Brex, select **Accounts** and then select **External accounts**. To the left of any Stifel Bank account, select the caret to expand the account details, then choose **Disconnect** at the bottom.

Showing 8 of 8 accounts

Account name	Institution	Account type	Available balance
CHECKING **** 5101	Stifel Bank - Commercial Banking	Checking	\$138.32 2 hours ago
SAVINGS **** 6840	Stifel Bank - Commercial Banking	Savings	\$29.71 2 hours ago
CHECKING **** 5102	Stifel Bank - Commercial Banking	Checking	\$18.87 2 hours ago
CHECKING **** 0299	Stifel Bank - Commercial Banking	Checking	\$12.24 2 hours ago
CHECKING **** 5805	Stifel Bank - Commercial Banking	Checking	\$6.40 2 hours ago

CHECKING

Updated Feb 19, 2026, 3:09:48 PM **\$138.32**

Routing number \*\*\*\* 8998 Account number \*\*\*\* 5101

Account type Checking Institution Stifel Bank - Commercial Banking

Status Connected Underwriting account No

Disconnect

2. On the **Disconnect Bank Account?** screen, you should see all your connected Stifel accounts listed. Select **Disconnect** again. You will receive confirmation that the bank connection has successfully been removed. Select **Done**.

Disconnect bank account?

Disconnecting a bank account may lower your credit limit. To learn more, see ["How do Brex credit limits work?"](#)

8 accounts will be disconnected:

- CHECKING \*\*\*\* 5102
- SAVINGS \*\*\*\* 2340
- CHECKING \*\*\*\* 5101
- CHECKING \*\*\*\* 5805
- CHECKING \*\*\*\* 6002
- SAVINGS \*\*\*\* 6840
- CHECKING \*\*\*\* 0299
- SAVINGS \*\*\*\* 6841

Cancel Disconnect

Bank connection has successfully been removed

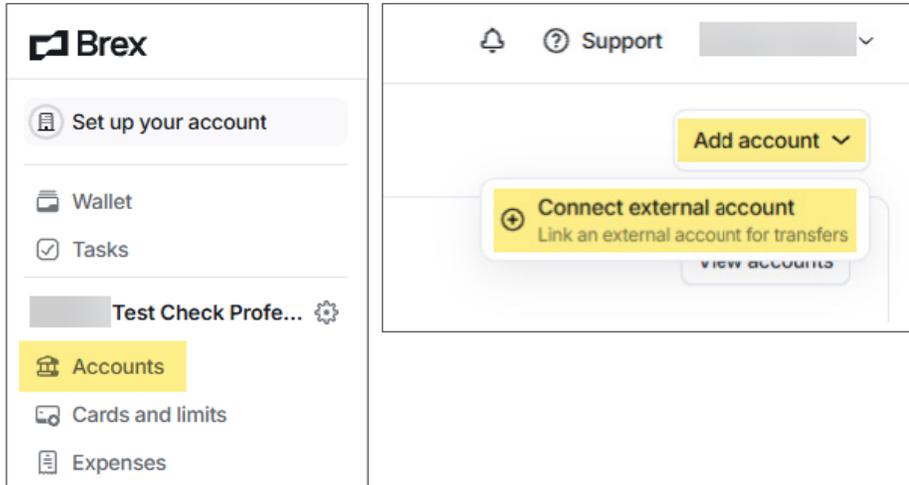
Done

3. Once the disconnection is finished, continue with the connection steps below.

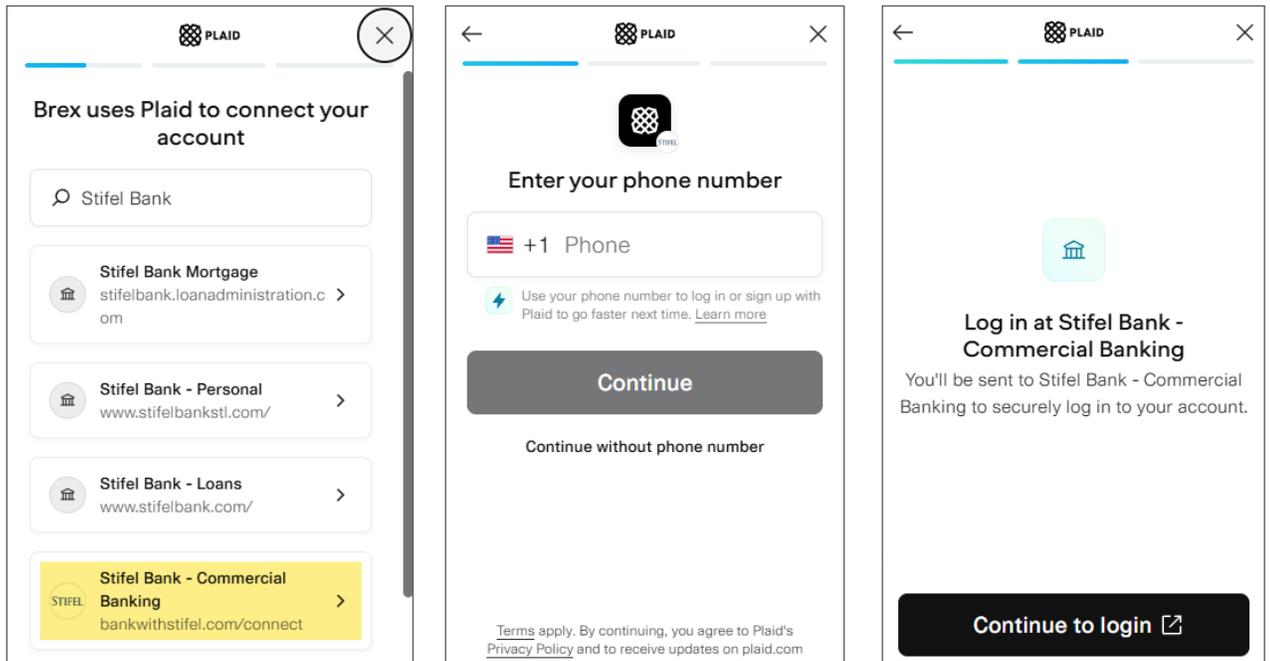
## Existing Brex Connection Walkthrough (Continued)

### Initiate Connecting an External Account

1. In Brex, select **Accounts** on the left sidebar and then **Add account** in the top right corner. From the dropdown menu, choose **Connect external account**.



2. The Plaid connection widget will appear. Use the search bar to look for **“Stifel Bank – Commercial Banking”**. If prompted, enter your **phone number** and select **Continue**. On the **“Log in at Stifel Bank – Commercial Banking”**, select **Continue to Login**.



## Existing Brex Connection Walkthrough (Continued)

### Treasury Central Connect Login

1. This is a pop-up window. Please ensure pop-ups aren't blocked by your browser. Enter your **Treasury Central Connect Username** and **Password** and click **Login**. If prompted, accept the **Terms & Conditions**, then click **Continue**. A list of available accounts will be displayed. Check **Select All** to add all accounts and click **Continue**.

*Important: Do NOT use your Treasury Central (online banking) credentials. Treasury Central Connect uses separate login credentials.*

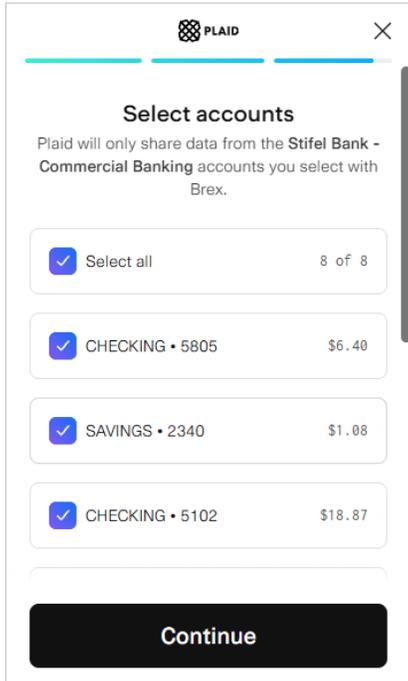
*If an account is not selected now, you may experience delays connecting it later. We recommend connecting all accounts.*

2. Review the list of accounts being connected to Brex and select **Submit**. You should then see a **Success!** confirmation screen. Select **Done**.

## Existing Brex Connection Walkthrough (Continued)

### Finalize in Plaid

1. On the **Select accounts** screen, select **all accounts** again and click **Continue**. On the “**Are these business or personal accounts?**” screen, choose **Business** and click **Confirm**.



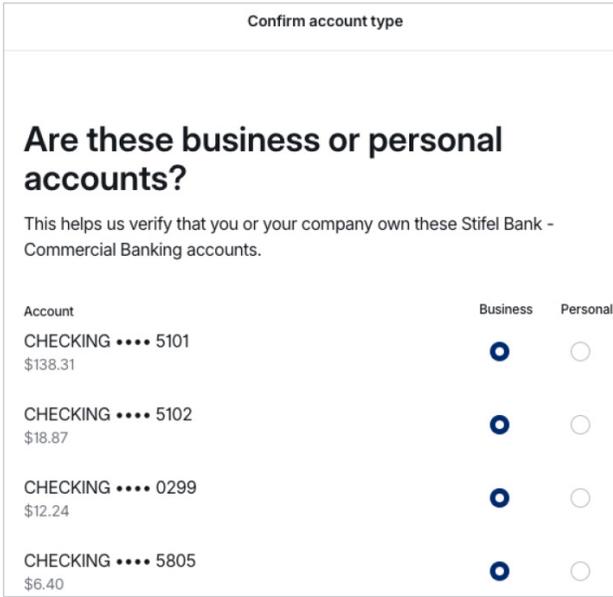
**PLAID** X

**Select accounts**

Plaid will only share data from the Stifel Bank - Commercial Banking accounts you select with Brex.

- Select all 8 of 8
- CHECKING • 5805 \$6.40
- SAVINGS • 2340 \$1.08
- CHECKING • 5102 \$18.87

**Continue**



**Confirm account type**

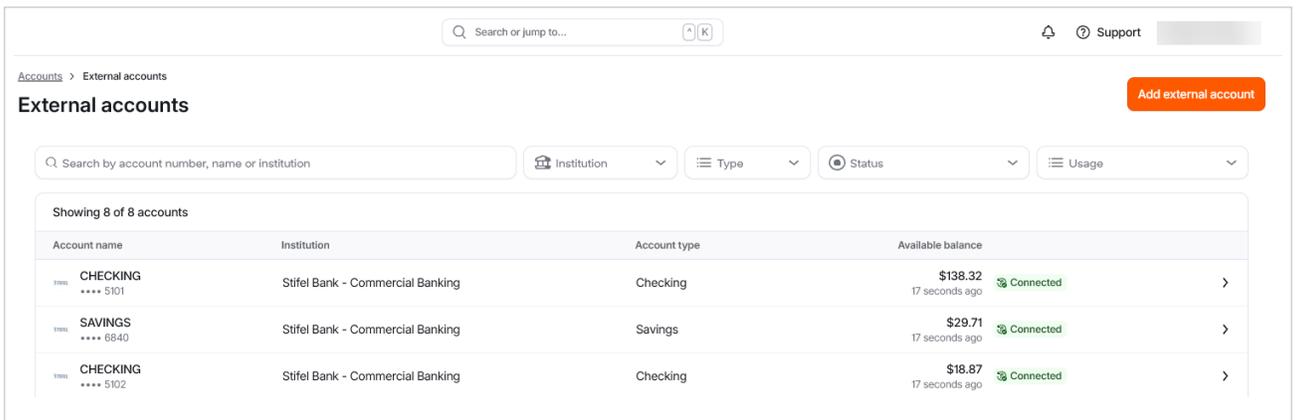
**Are these business or personal accounts?**

This helps us verify that you or your company own these Stifel Bank - Commercial Banking accounts.

Account	Business	Personal
CHECKING •••• 5101 \$138.31	<input checked="" type="radio"/>	<input type="radio"/>
CHECKING •••• 5102 \$18.87	<input checked="" type="radio"/>	<input type="radio"/>
CHECKING •••• 0299 \$12.24	<input checked="" type="radio"/>	<input type="radio"/>
CHECKING •••• 5805 \$6.40	<input checked="" type="radio"/>	<input type="radio"/>

### Completion

Your **Stifel Bank accounts** should now appear under the **External accounts** section within Brex.



Accounts > External accounts

**External accounts** Add external account

Search by account number, name or institution

Institution Type Status Usage

Showing 8 of 8 accounts

Account name	Institution	Account type	Available balance
CHECKING •••• 5101	Stifel Bank - Commercial Banking	Checking	\$138.32 17 seconds ago <span style="color: green;">Connected</span>
SAVINGS •••• 6840	Stifel Bank - Commercial Banking	Savings	\$29.71 17 seconds ago <span style="color: green;">Connected</span>
CHECKING •••• 5102	Stifel Bank - Commercial Banking	Checking	\$18.87 17 seconds ago <span style="color: green;">Connected</span>