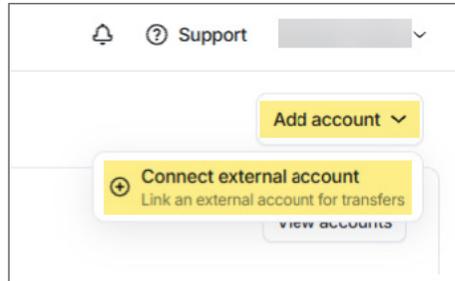
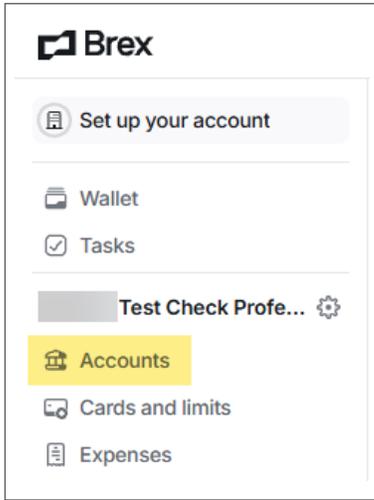


New Brex Connection Walkthrough

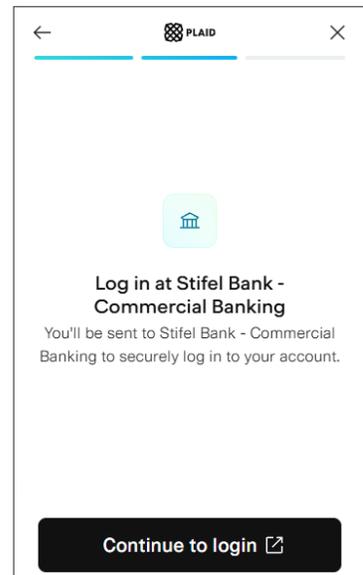
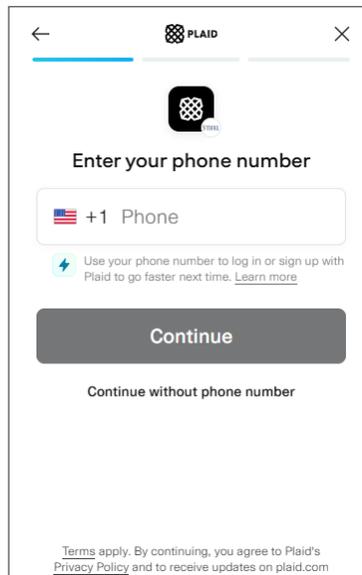
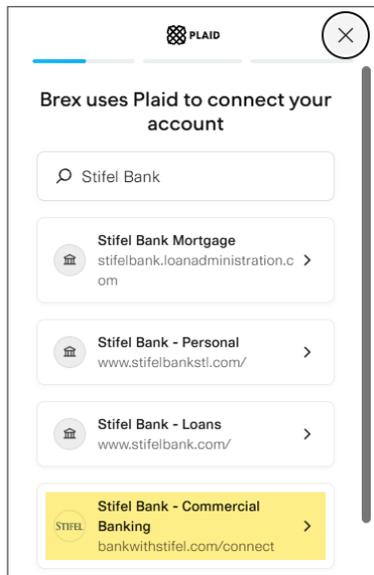
This guide provides step-by-step instructions for connecting your Stifel Bank Treasury accounts to Brex. If you need assistance at any step, please contact your Stifel Bank Treasury Management Team.

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**.



New 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 this is your first time logging in, you will be prompted to **change your password**. Accept **Terms & Conditions** if prompted, 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**.

New 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

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.

Search or jump to... ⌘ K Support

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 Connected
SAVINGS •••• 6840	Stifel Bank - Commercial Banking	Savings	\$29.71 17 seconds ago Connected
CHECKING •••• 5102	Stifel Bank - Commercial Banking	Checking	\$18.87 17 seconds ago Connected