

[Your Name/Lead Fiduciary Name]

[Your Address]

[City, State, Zip Code]

[Phone Number]

[Email Address]

[Date]

[Bank Name]

[Bank Branch Address]

[City, State, Zip Code]

RE: Application for Fiduciary Joint Savings Account

To the Branch Manager,

I am writing to formally apply for the opening of a Fiduciary Joint Savings Account at [Bank Name].

This account is being established for the benefit of [Name of Beneficiary/Estate/Ward]. The account will be managed by the following appointed fiduciaries:

- [Fiduciary 1 Name] acting as [Title, e.g., Co-Trustee/Co-Executor]
- [Fiduciary 2 Name] acting as [Title, e.g., Co-Trustee/Co-Executor]

The purpose of this account is to hold and manage funds in a fiduciary capacity as authorized by [Name of Document, e.g., The Will of XYZ / The ABC Living Trust / Court Order Case #].

Please find the following documents enclosed for your review:

- Certified copies of the [Trust Agreement/Letters Testamentary/Court Appointment]
- Tax Identification Number (TIN) or Social Security Number for the [Trust/Estate/Beneficiary]
- Government-issued identification for all fiduciaries

We request that the account be titled as follows: "[Name of Fiduciary 1] and [Name of Fiduciary 2], as [Title], for the benefit of [Name of Beneficiary/Estate]."

Please let us know if any further documentation or an in-person meeting is required to finalize the application process. We look forward to your prompt response.

Sincerely,

[Signature of Fiduciary 1]

[Printed Name of Fiduciary 1]

[Signature of Fiduciary 2]

[Printed Name of Fiduciary 2]