

[Your Name]
[Your Address]
[City, State, Zip Code]
[Phone Number]
[Email Address]

[Date]

[Bank Name]
[Bank Branch Address]
[City, State, Zip Code]

RE: Request to Open a Custodial Trust Account

Dear Bank Manager,

I am writing to formally request the opening of a Custodial Trust Account under the [State Name] Uniform Transfers to Minors Act (UTMA) or Uniform Gifts to Minors Act (UGMA).

I wish to be designated as the Custodian for the following beneficiary:

- **Beneficiary Name:** [Minor's Full Name]
- **Beneficiary Date of Birth:** [Date of Birth]
- **Beneficiary Social Security Number:** [SSN]

Enclosed with this letter is an initial deposit in the amount of \$[Amount] in the form of a [Check/Money Order/Transfer Request] to fund the account. Please find the attached copies of identification for both myself and the minor as required by your institution.

Please provide me with the necessary account opening documents and signature cards for completion. I look forward to receiving confirmation once the account is established.

Thank you for your assistance with this matter.

Sincerely,

[Your Signature]

[Your Printed Name]
[Your Social Security Number]