

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

[Date]

[Financial Institution Name]
[Department Name, if applicable]
[Address]
[City, State, Zip Code]

Subject: Request to Open a Uniform Gift to Minors Act (UGMA) Account

Dear Customer Service Team,

I am writing to formally request the opening of a new custodial account under the Uniform Gift to Minors Act (UGMA) for the benefit of a minor. I intend to serve as the Custodian for this account.

Please find the necessary details for the account setup below:

Custodian Information:

Full Legal Name: [Your Full Name]
Social Security Number: [Your SSN]
Date of Birth: [Your Date of Birth]

Minor Beneficiary Information:

Full Legal Name: [Minor's Full Name]
Social Security Number: [Minor's SSN]
Date of Birth: [Minor's Date of Birth]
State of Residence: [State Name]

I have enclosed the following documents to facilitate this request:

- A completed and signed account application form.
- A copy of my government-issued identification.
- A check for the initial deposit of \$[Amount].

Please notify me once the account has been established or if you require any additional information or documentation. You may contact me at [Phone Number] or [Email Address].

Thank you for your assistance with this matter.

Sincerely,

[Your Signature]

[Your Printed Name]