

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

[Date]

[Bank or Financial Institution Name]
[Branch Address]
[City, State, Zip Code]

Subject: Request to Open a UTMA Custodial Account

To Whom It May Concern,

I am writing to formally request the opening of a custodial account under the Uniform Transfers to Minors Act (UTMA) for the benefit of the minor named below. I wish to be designated as the Custodian for this account.

Minor's Information:

Full Name: [Minor's Full Name]
Date of Birth: [Minor's DOB]
Social Security Number: [Minor's SSN]

Custodian's Information:

Full Name: [Your Full Name]
Social Security Number: [Your SSN]
Relationship to Minor: [e.g., Parent, Grandparent, Guardian]

Please let me know which specific forms are required to finalize this application and if I need to provide copies of identification or the minor's birth certificate. I intend to fund the account with an initial deposit of \$[Amount].

Thank you for your assistance. I look forward to hearing from you soon.

Sincerely,

[Your Signature]

[Your Printed Name]