

[Date]

[Bank Name]

[Branch Address]

[City, State, Zip Code]

RE: Request to Open New Joint Revocable Trust Account

To the Account Services Department,

We, [Grantor Name 1] and [Grantor Name 2], are writing to formally request the opening of a new joint revocable trust bank account under the following legal title:

[Full Name of Trust, e.g., The Smith Family Revocable Living Trust], dated [Date of Trust Agreement].

The designated Trustees for this account will be:

- [Trustee Name 1]
- [Trustee Name 2]

Enclosed with this letter, please find the following required documentation:

- Executed Certificate of Trust (or Memorandum of Trust)
- Tax Identification Number (or Social Security Numbers of the Grantors)
- Copies of government-issued identification for both Trustees
- Initial deposit in the amount of \$[Amount]

We request that this account be set up with [checking/savings/investment] features and that [both/either] Trustee(s) be authorized to sign checks and perform transactions independently.

Please contact us at [Phone Number] or [Email Address] if any additional information or signatures are required to finalize this request.

Sincerely,

[Signature of Trustee 1]

[Printed Name]

[Signature of Trustee 2]

[Printed Name]