

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

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

Subject: Request to Open a Living Revocable Trust Account

To Whom It May Concern,

I am writing to formally request the opening of a new bank account in the name of a Living Revocable Trust. I am the Grantor and the primary Trustee of this trust.

Please find the following details regarding the trust:

- **Full Name of Trust:** [Exact Name of Trust as written in document]
- **Date of Trust Agreement:** [Date the trust was signed]
- **Trust Tax Identification Number:** [SSN or EIN]
- **Trustees:** [Your Name] (and [Co-Trustee Name], if applicable)

I have enclosed/attached a Certificate of Trust (or a copy of the Trust Agreement) to verify the legal existence of the trust and my authority to act on its behalf. I wish to open a [Checking/Savings/Money Market] account and would like to link it to my existing personal profile, if possible.

Please let me know if there are additional forms required or if I need to schedule an in-person appointment to provide identification and signatures.

Thank you for your assistance.

Sincerely,

[Your Signature]

[Your Printed Name]
Trustee