

[Date]

[Bank Name]

[Branch Address]

[City, State, Zip Code]

RE: Request to Open New Revocable Trust Account

Dear [Bank Representative Name or Branch Manager],

I am writing to formally request the opening of a new bank account for a Revocable Living Trust. Please find the relevant details below:

- **Full Name of Trust:** [Full Name of Trust, e.g., The John Doe Revocable Trust]
- **Date of Trust Agreement:** [Date Trust was signed]
- **Trustee(s):** [Name of Current Trustee(s)]
- **Taxpayer Identification Number:** [SSN or EIN used for the Trust]

In the event of my death or incapacity, the following individual is named as the **Successor Trustee** with authority to manage this account:

- **Successor Trustee Name:** [Name of Successor Trustee]
- **Successor Trustee Contact:** [Phone Number/Email]

I have enclosed the following documents for your review:

- Certificate of Trust (or Memorandum of Trust)
- Copy of government-issued photo identification
- [List any other required documents, e.g., Proof of Address]

Please let me know if any additional forms or signatures are required to finalize the account setup. I can be reached at [Your Phone Number] or [Your Email Address].

Sincerely,

[Your Signature]

[Your Printed Name]

Grantor/Trustee