

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

[Date]

[Bank or Financial Institution Name]
[Department Name, e.g., Wealth Management]
[Address]
[City, State, Zip Code]

RE: Request to Open New Investment Account for the [Exact Name of Trust]

To Whom It May Concern,

I am writing to formally request the opening of a new investment account for the [Full Name of the Revocable Trust], established on [Date Trust was Created].

I am currently serving as the [Trustee/Co-Trustee] of this revocable living trust. I have enclosed the following documents required for your review and account processing:

- A copy of the Certificate of Trust (or relevant Trust Agreement pages).
- A copy of my government-issued identification.
- The Trust's Taxpayer Identification Number (TIN/SSN).

Please provide the necessary application forms and any additional requirements needed to finalize the account setup. I am interested in [mention specific investment types, e.g., brokerage services, mutual funds, or managed portfolios].

Thank you for your assistance with this matter. I look forward to your prompt response.

Sincerely,

[Your Signature]

[Your Printed Name]
Trustee