

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

[Date]

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

RE: Request to Open a Revocable Special Needs Trust Account

To the Trust Department or Branch Manager:

I am writing to formally request the opening of a new fiduciary bank account for the **[Full Name of the Trust, e.g., The John Doe Special Needs Revocable Trust]**, established on **[Date Trust was Executed]**.

I am the designated Trustee for this account. The purpose of this trust is to provide for the supplemental care of the beneficiary, **[Beneficiary Name]**, while maintaining their eligibility for government assistance programs.

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

- A Certificate of Trust (or a copy of the Trust Agreement).
- The Employer Identification Number (EIN) issued by the IRS for the Trust.
- Valid government-issued identification for the Trustee(s).
- [List any other required documents, e.g., Power of Attorney].

I would like to request that the account be titled exactly as follows:

[Name of Trustee], Trustee of the [Full Name of Trust] u/a/d [Date of Trust Agreement]

Please let me know if there are additional forms to sign or specific banking procedures required to finalize the activation of this account. I can be reached at [Your Phone Number] to schedule an appointment or provide further information.

Thank you for your assistance with this matter.

Sincerely,

[Signature]

[Your Printed Name]
Trustee