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

[Date]

[Relationship Manager Name or "Private Banking Department"]
[Bank Name]
[Bank Address]
[City, State, Zip Code]

Subject: Formal Request for High Net Worth Private Wealth Management Account Opening

Dear [Manager Name or Sir/Madam],

I am writing to formally express my interest in establishing a Private Wealth Management relationship with [Bank Name]. Based on the reputation of your institution, I am seeking to open a High Net Worth (HNW) account to manage my personal assets and long-term financial objectives.

I am interested in utilizing your firm's expertise in the following areas:

- Discretionary Portfolio Management
- Customized Investment Advisory
- Estate and Succession Planning
- Tax Optimization Strategies
- Lombard Lending and Credit Facilities

To facilitate your initial Due Diligence and "Know Your Customer" (KYC) procedures, I am prepared to provide documentation regarding the Source of Wealth (SOW) and Source of Funds (SOF). My current liquid net worth exceeds the minimum threshold required for your private banking tier.

Please let me know the specific requirements and documentation needed to initiate the onboarding process. I would also welcome the opportunity to schedule a meeting or a call to discuss how [Bank Name] can assist in achieving my financial goals.

Thank you for your time and professional attention to this matter.

Sincerely,

[Your Signature]

[Your Printed Name]