[Date]

[Recipient Name/Relationship Manager Name]
[Department Name, e.g., Institutional Private Wealth Division]
[Financial Institution Name]
[Address Line 1]
[City, State, Zip Code]

Subject: Request to Open an Institutional Private Wealth Management Account

Dear [Recipient Name],

I am writing on behalf of [Full Legal Name of Institution/Entity] to formally request the opening of a Private Wealth Management account with your institution.

Our entity is a [Type of Entity, e.g., Corporation, Endowment, Family Office, or Foundation] registered in [Jurisdiction]. We are interested in leveraging your firm's expertise in [specific services, e.g., asset management, custody services, or alternative investments] to manage our institutional capital.

To facilitate the onboarding and Know Your Customer (KYC) process, we have prepared the following preliminary information:

- Legal Entity Identifier (LEI): [Insert LEI Number]
- Tax Identification Number: [Insert TIN]
- Primary Purpose of Account: [e.g., Long-term capital preservation / Liquid reserves management]
- Expected Initial Deposit: [Amount and Currency]

Please provide us with the necessary application forms, a comprehensive list of required corporate documentation, and the contact details of the dedicated team that will handle our account.

We look forward to a successful professional relationship. Should you require immediate information, please contact [Contact Person Name] at [Phone Number] or [Email Address].

Sincerely,

[Signature]
[Name of Authorized Signatory]
[Title/Position]
[Institution Name]