[Date]

[Relationship Manager Name]
[Bank Name]
[Private Wealth Management Division]
[Bank Address]
[City, State, Zip Code]

Subject: Request for Opening of a Joint Private Wealth Management Account

Dear [Relationship Manager Name],

We are writing to formally request the opening of a Joint Private Wealth Management Account with [Bank Name].

The account holders will be:

- **Primary Applicant:** [Full Name 1]
- **Secondary Applicant:** [Full Name 2]

We are interested in this account to manage our combined assets and to utilize your firm's specialized investment advisory and wealth planning services. We would like the account to be set up as **[Joint Tenants with Right of Survivorship / Tenants in Common]**.

Please find the following documents for both applicants attached to this request:

- Certified copies of Passports/Government IDs
- Proof of Residential Address (utility bills/bank statements)
- Source of Wealth declaration and supporting documentation
- Completed bank application forms (if already provided)

We would like to schedule a meeting to discuss our investment objectives, risk tolerance, and the specific mandates for this account. Please let us know your availability for a call or an in-person meeting.

Thank you for your assistance in this matter.

Sincerely,

____
[Signature - Applicant 1]
[Print Name 1]
[Phone Number]
[Email Address]

[Signature - Applicant 2]
[Print Name 2]
[Phone Number]
[Email Address]