

[Your Name/Organization Name]

[Your Address]

[City, State, Zip Code]

[Your Phone Number]

[Your Email Address]

[Date]

[Relationship Manager Name]

[Financial Institution Name]

[Private Wealth Department]

[Institution Address]

Subject: Request to Open a Philanthropic Private Wealth Management Account

Dear [Manager Name],

I am writing to formally request the opening of a specialized Private Wealth Management account dedicated to philanthropic activities. Our objective is to establish a structured investment vehicle that aligns with our long-term charitable goals and social impact mandates.

We are interested in your institution's expertise regarding:

- Donor-Advised Funds (DAF) or Private Foundation management.
- Environmental, Social, and Governance (ESG) investment strategies.
- Tax-efficient gifting and legacy planning.
- Impact reporting and administrative support.

The initial funding for this account is estimated at [Insert Amount]. Please provide the necessary documentation, compliance requirements, and a schedule of fees associated with your philanthropic advisory services.

We would like to schedule a meeting to discuss our mission and how your team can facilitate our charitable vision. Please let us know your availability for a preliminary call or meeting.

Thank you for your time and professional assistance.

Sincerely,

[Signature]

[Your Printed Name]

[Your Title, if applicable]