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

[Date]

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

RE: Request to Open a Private Wealth Management Trust Account

Dear [Relationship Manager Name],

I am writing to formally request the opening of a new Private Wealth Management Trust Account with [Bank/Institution Name] under the title of **[Full Legal Name of Trust]**, dated **[Date of Trust Agreement]**.

As the [Settlor/Grantor/Trustee], I wish to utilize your institution's private wealth services for the purpose of [investment management/estate planning/asset protection].

Please find the following preliminary documents attached for your review:

- Executed Copy of the Trust Agreement (or Certificate of Trust)
- Tax Identification Number (EIN) for the Trust
- Government-issued identification for all Trustees
- Proof of Address

I would like to schedule a meeting to discuss the specific investment mandates, fee structures, and the onboarding process. Please let me know your availability or if any additional documentation is required to proceed with the KYC (Know Your Customer) and AML (Anti-Money Laundering) verification.

Thank you for your assistance. I look forward to working with your team.

Sincerely,

[Your Signature]

[Your Printed Name]
[Title: e.g., Trustee]