

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

[Bank Name]
[Branch Address]
[City, State, Zip Code]

RE: Request to Add Joint Account Holder to Account Number: [Your Account Number]

To Whom It May Concern,

I am writing to formally request the addition of my caregiver, [Caregiver's Full Name], as a joint account holder on my existing [Type of Account, e.g., Savings/Checking] account referenced above.

Due to [reason for request, e.g., health reasons or assistance with financial management], I wish for [Caregiver's Name] to have full access to the account to manage transactions, pay bills, and handle banking matters on my behalf.

I have enclosed the following information for the new joint holder:

- Full Legal Name: [Caregiver's Full Name]
- Social Security Number: [Caregiver's SSN]
- Date of Birth: [Caregiver's DOB]
- Contact Number: [Caregiver's Phone Number]

Please let me know what further documentation or in-person verification is required to complete this process. We are available to visit the branch on [Date/Time] if necessary.

Thank you for your assistance with this matter.

Sincerely,

[Your Signature]
[Your Printed Name]

[Caregiver's Signature]
[Caregiver's Printed Name]