

[Your Name]
[Your Address]
[Your Phone Number]
[Your Email Address]

[Date]

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

Subject: Request to Add Joint Account Holder / Financial Proxy

To Whom It May Concern,

I am writing to formally request the addition of a joint account holder to my existing bank account. I wish for this individual to act as my financial proxy with full access and management rights to the account.

Primary Account Information:

Account Name: [Your Full Name]
Account Number: [Your Account Number]

New Joint Account Holder Information:

Full Name: [Proxy's Full Name]
Relationship to Primary Holder: [e.g., Son, Daughter, Spouse, Legal Representative]
Social Security Number/ID: [Proxy's SSN or ID Number]
Date of Birth: [Proxy's Date of Birth]
Address: [Proxy's Full Address]

Please provide the necessary documentation and forms required to finalize this addition. We are prepared to visit the branch in person to verify identities and provide signatures if required.

Thank you for your assistance with this matter. I look forward to your prompt response.

Sincerely,

[Your Signature]

[Your Printed Name]

[Proxy's Signature]

[Proxy's Printed Name]