

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

[Date]

[Financial Institution Name]
[Department Name, e.g., Client Services]
[Institution Address]
[City, State, Zip Code]

Subject: Request to Add Joint Account Holder to Investment Account #[Your Account Number]

To Whom It May Concern,

I am writing to formally request the addition of a joint account holder to my existing investment account, account number [Account Number].

I would like to add the following individual as a joint owner with right of survivorship:

- **Full Legal Name:** [New Holder's Full Name]
- **Social Security Number:** [New Holder's SSN]
- **Date of Birth:** [New Holder's DOB]
- **Address:** [New Holder's Address]
- **Relationship to Primary Holder:** [e.g., Spouse, Partner, Child]

Please find the enclosed completed and signed application forms, along with copies of the required identification documents for the new joint holder.

Please notify me once this change has been processed or if you require any additional documentation to complete this request. You may reach me at [Your Phone Number] or [Your Email Address].

Thank you for your assistance with this matter.

Sincerely,

[Your Signature]

[Your Printed Name]

Joint Applicant Signature: _____
Date: _____