

Date: [Insert Date]

To: [Name of Financial Institution]  
Attention: Privacy/Compliance Department  
[Street Address]  
[City, State, Zip Code]

**RE: Notice of Right to Financial Privacy - Joint Account Holders**

Account Number(s): [Insert Account Number(s)]

To Whom It May Concern,

I am writing this letter as a joint holder of the above-referenced account(s) to formally assert my rights under the Right to Financial Privacy Act (RFPA) and relevant state privacy laws.

Specifically, I request that [Name of Financial Institution]:

- Limit the disclosure of my non-public personal information to third parties, except as strictly required by law.
- Notify me immediately if any government agency or third party requests access to my financial records via subpoena, summons, or formal written request, to the extent permitted by law.
- Provide a copy of your current privacy policy regarding the sharing of information between joint account holders and external entities.

This letter serves as a formal notice that I do not waive any privacy protections afforded to me as a co-owner of this account. Any disclosure of my personal financial data without proper legal process or my express written consent may be considered a violation of my privacy rights.

Please update your records to reflect this request and provide written confirmation that this notice has been received and processed.

Sincerely,

[Your Signature]  
[Your Printed Name]  
[Your Address]  
[Your Phone Number]

[Co-Holder Signature (Optional)]  
[Co-Holder Printed Name]