

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

[Date]

[Recipient Name or Financial Institution Name]
[Department, if applicable]
[Address]
[City, State, Zip Code]

Subject: Notification of Joint Account Holdings - Account Number: [Account Number]

Dear [Name of Recipient or Customer Service Department],

I am writing to formally notify you regarding the joint ownership status of the following account(s) held at your institution:

- **Account Type:** [e.g., Savings, Checking, Investment]
- **Account Number:** [Account Number]
- **Primary Account Holder:** [Full Name]
- **Joint Account Holder:** [Full Name]

Please ensure that your records accurately reflect that both parties listed above hold joint legal ownership of these funds with [Right of Survivorship / Tenancy in Common].

Furthermore, please ensure that all future correspondence, statements, and tax documents related to this account are updated to reflect this joint status. [Optional: Mention any specific requests, such as adding a new debit card or updating contact information for the joint holder].

Attached to this letter are copies of [List any attached documents, e.g., Photo IDs, Joint Account Agreement] to verify the identities of the account holders.

If you require any further documentation or have any questions regarding this notification, please contact me at [Your Phone Number].

Thank you for your prompt attention to this matter.

Sincerely,

[Your Signature]
[Your Printed Name]

[Joint Holder Signature]
[Joint Holder Printed Name]