

Joint Finances Account Application

Date: [Insert Date]

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

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

Dear [Bank Manager's Name],

We are writing to formally apply for a joint finances account at [Bank Name]. We believe this account will help us manage our finances more efficiently as a couple.

Below are the details of both applicants:

Applicant 1:

Name: [Your Full Name]
Date of Birth: [Your DOB]
Social Security Number: [Your SSN]

Applicant 2:

Name: [Partner's Full Name]
Date of Birth: [Partner's DOB]
Social Security Number: [Partner's SSN]

We have attached the required documents, including identification and proof of address, as per your bank's requirements.

Thank you for considering our application. We look forward to your positive response.

Sincerely,
[Your Name] & [Partner's Name]