

Joint Account Conversion Request

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],

I am writing to request the conversion of my individual account to a joint account. Below are the details of my current account:

Account Holder Name: [Your Name] Account Number: [Your Account Number]

I would like to add the following individual as a joint account holder:

Joint Account Holder Name: [Joint Account Holder's Name] Social Security Number: [Joint Account Holder's SSN] Address: [Joint Account Holder's Address]

This conversion is intended for financial planning purposes, and I believe it would facilitate our shared financial objectives. Please let me know if there are any forms or documentation required to complete this process.

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

Sincerely,

[Your Signature (if sending a hard copy)] [Your Printed Name]