

# Joint Account Conversion Request

Date: [Insert Date]

[Your Name]

[Your Address]

[City, State, Zip Code]

Email: [Your Email]

Phone: [Your Phone Number]

[Bank Name]

[Bank Address]

[City, State, Zip Code]

## **Subject: Request for Joint Account Conversion for Savings Goals**

Dear [Bank Manager's Name],

We, [Your Name] and [Joint Account Holder's Name], are writing to request the conversion of our existing joint account, [Account Number], into a joint savings account aimed at achieving our specific savings goals.

Our primary savings goals include:

- [Goal 1: e.g., House Down Payment]
- [Goal 2: e.g., Emergency Fund]
- [Goal 3: e.g., Vacation Savings]

We believe that a dedicated savings account will help us manage our finances effectively and reach our objectives more efficiently.

We kindly ask you to provide us with the necessary steps to initiate this conversion. Should you require any further information or documentation, please feel free to contact us at the phone number or email above.

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

Sincerely,

[Your Name]

[Joint Account Holder's Name]