

Joint Account Conversion Request

Date: [Insert Date]

To: [Bank/Financial Institution Name]

Address: [Bank Address]

Subject: Request for Joint Account Conversion for Trust Beneficiaries

Dear [Bank Manager's Name],

We, the undersigned beneficiaries of the [Trust Name], hereby request the conversion of our current joint account ([Account Number]) to reflect our status as beneficiaries of the aforementioned trust. The details of the trust and its beneficiaries are as follows:

Trust Details:

Trust Name: [Trust Name]

Trustee Name: [Trustee's Name]

Trust Account Number: [Trust Account Number]

Beneficiary Information:

- Name: [Beneficiary Name 1], SSN: [SSN], Address: [Beneficiary Address]
- Name: [Beneficiary Name 2], SSN: [SSN], Address: [Beneficiary Address]
- Name: [Beneficiary Name 3], SSN: [SSN], Address: [Beneficiary Address]

Attached are the copies of the trust documents and any other required identification for the beneficiaries. We appreciate your assistance in processing this request promptly.

If you require any further information or documentation, please do not hesitate to contact us at [Your Contact Number] or [Your Email Address].

Thank you for your attention to this matter.

Sincerely,

[Beneficiary Name 1]

[Beneficiary Signature]

[Date]

[Beneficiary Name 2]
[Beneficiary Signature]
[Date]

[Beneficiary Name 3]
[Beneficiary Signature]
[Date]