

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

Subject: Request to Set Up an Investment Account

Dear [Bank Manager's Name or Investment Officer's Name],
I hope this letter finds you well. I am writing to formally request the setup of an investment account with [Bank Name]. I have researched various investment options and believe that your services align with my financial goals.

Please find my personal details below for your records:

- Full Name: [Your Full Name]
- Social Security Number: [Your SSN]
- Date of Birth: [Your DOB]
- Occupation: [Your Occupation]
- Annual Income: [Your Annual Income]

I would appreciate if you could provide me with the necessary forms and information regarding the types of investment accounts available and any associated fees. I am particularly interested in [mention any specific investments or types of accounts you're interested in, e.g., mutual funds, stocks, retirement accounts, etc.].

Thank you for your attention to this matter. I look forward to your prompt response and to working together with [Bank Name] for my investment needs.

Sincerely,

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