



Personalized Escrow Plan

Help us to ensure that our team provides the best service exactly the way you like it.

Client Name: _____ Escrow Officer: _____

Address: _____ Phone: _____

1) What is the most important thing you expect from your escrow team?

2) Do you work with a Transaction Coordinator or anyone else that we should include in our communications?

3) How do you prefer that we offer communication?

Email Phone Text

4) How would you like your escrow packages delivered?

E-Mail Hard Copy Delivery

Lastly, do you attend your signings? Yes No Sometimes

Always at your office? Always the best location to fit the needs of the client(s)? Always at the title company?

MISC NOTES: