

**Escrow Holdback**  
**Document Preparation Request**

**To Submit Digitally:**

- Complete and save this request form and attach applicable documents
- Email file to: [docservices@gregg-valby.com](mailto:docservices@gregg-valby.com)

**To Submit Using Hard-Copies:**

- Complete this request form and attach applicable documents
- Fax to: 800-688-1809  
Or
- Scan and save as an image file
- Email file to: [docservices@gregg-valby.com](mailto:docservices@gregg-valby.com)

**A Gregg & Valby team member will be in contact  
with you regarding any questions. Thank you!**

Date: \_\_\_\_\_ From: \_\_\_\_\_ Phone: \_\_\_\_\_

Return to (fax number or email address): \_\_\_\_\_

Borrower: \_\_\_\_\_ GF Number: \_\_\_\_\_

**Accompanying the Order Form needs to be:**

- Closing Instructions
- Contractor Bid/Contract/Proposal
- Schedule "A" – Legal Description
- Other: \_\_\_\_\_

**Complete the following:**

Amount to hold: \$ \_\_\_\_\_

**Source of funds:**  Borrower(s) \$ \_\_\_\_\_  Seller \$ \_\_\_\_\_  Lender \$ \_\_\_\_\_

*(If more than one party, break down amounts contributed by each party above)*

**Party to escrow the funds:**  Lender  Settlement Agent

**Has a deposit been made by the borrower prior to closing?** *(If yes, include amount)*

Yes \$ \_\_\_\_\_  No  Unknown

**Prepare the Mechanic's and Materialman's Lien:**  Yes  No

**Instructions for delivery of Escrow Holdback Agreement:**

- Email: \_\_\_\_\_
- Fax #: \_\_\_\_\_
- Mail \_\_\_\_\_
- Overnight (FedEx or UPS) 3rd Party Account # to be billed: \_\_\_\_\_

Recipient's Name: \_\_\_\_\_

Recipient's Address: \_\_\_\_\_

Recipient's Phone #: \_\_\_\_\_

If you have any questions:  
Call 800.688.1006 and ask for our Document Services Department  
or  
Email: [legalstaff@gregg-valby.com](mailto:legalstaff@gregg-valby.com)