



THE FIVE STEPS OF A PROPERLY COMPLETED NOTARIZATION

Every properly completed notarization has five steps. Here is a brief overview of the steps for your review.

1. REVIEW THE DOCUMENT

- a. Look over the whole document
- b. Look for necessary acts, blank spaces, other issues that need to be addressed

2. IDENTIFY THE SIGNER

- a. Check ID carefully for validity, signs of fraud
- b. ask for a second ID if you have concerns

3. VERIFY THE SIGNER'S WILLINGNESS AND CAPACITY

- a. Ask clarifying questions ("Do you understand the purpose of this document?", "Are you willing to sign this document?")
- b. Ask others to leave the room if you have concerns
- c. **You may not explain contents of document to the signer** (that's giving legal advice)

4. COMPLETE THE JOURNAL

- a. Be sure that your customer signs your journal
- b. Note anything unusual about the transaction (customer had to re-sign, had to add component to the certificate, had to correct component of the certificate, had to ask signer for second form of ID)

5. COMPLETE THE CERTIFICATE

- a. Check language to make sure you can do what it asks
- b. Make sure that all the required six components are there
- c. Note anything unusual about the transaction (customer had to re-sign, had to add component to the certificate, had to correct component of the certificate, had to ask signer for second form of ID)