



CLIENT PREPARATION GUIDE

Appointment Checklist

Everything you need to have ready before your notary appointment. Print this page or check items as you prepare.

Before your appointment

- Have your **unsigned** documents ready — do **not** sign in advance.
- Bring a **current, government-issued photo ID** for each signer (see Acceptable IDs).
- Confirm the **full legal name** on each document matches the name on your ID.
- Arrange **witnesses** in advance if your document requires them (we can help identify requirements).
- For mobile appointments, confirm a **quiet, well-lit location** and available parking.
- Confirm all **travel fees are paid in advance** for mobile / dispatch service.
- Have any **reference numbers** ready (loan #, case #, order #, etc.).

At the appointment

- Each signer must appear **in person** and be **willing and aware**.
- Present ID to the notary **before** any signature or seal is applied.
- Sign each document exactly as your name appears on your ID.
- Do not fill in blanks on the document unless directed by the receiving party.
- Request additional certified copies at the time of the appointment if needed.

All Sales Are Final. Once a notarial act is performed and the seal is applied, the service is complete and non-refundable. Travel and dispatch fees are also non-refundable once travel has been scheduled or initiated.