



LOAN SIGNING SERVICES

Loan Signing Preparation Checklist

For borrowers, lenders, escrow officers, and title companies coordinating a signing appointment.

Borrower Preparation

- Bring **current, unexpired government photo ID** for each borrower.
- Confirm the **full legal name** on loan documents matches ID exactly.
- Review the estimated Closing Disclosure in advance and note any questions.
- Have any required **cashier's checks or wire confirmations** ready.
- Ensure the signing location has adequate **table space and lighting**.
- Silence phones and minimize distractions during the appointment.

Escrow / Lender / Title Coordination

- Send complete loan package (**PDF, single file, tabbed**) at least 12 hours in advance.
- Include return shipping label and drop-off preference.
- Provide direct contact for signer questions (loan officer / escrow officer).
- Communicate any last-minute changes to the signer immediately.
- Confirm any **witness or notary certificate requirements** in advance.

Common Loan Documents Notarized

- Deed of Trust / Mortgage
- Signature/Name Affidavit
- Occupancy Affidavit
- Compliance Agreement
- Grant Deed / Quitclaim Deed
- Errors & Omissions Compliance Agreement

Signing Agent Standards. Our Loan Signing Agents are NSA-certified, background screened, bonded, and E&O; insured. Travel and dispatch fees are paid in advance and are non-refundable once travel is initiated.