



****NSA 101 PRE-WORKSHOP/TRAINING ASSIGNMENT****

NSA 101 is practical hands-on training for the brand new notary signing agent. When you purchase training/coaching from me (in person or via Zoom) you will receive my sample refinance loan package via email. This document contains the assignment instructions.

*** = REQUIRED, no exceptions*

This mandatory notary signing agent assignment is a critical part of your hands-on NSA 101 training. Before we meet for our training session, you are expected to review the notary reference materials, watch the NSA 101 YouTube videos, and print/prepare the NSA 101 sample loan package as instructed. Allow yourself time to complete this portion of your training. It is to your benefit to complete this training assignment before we meet because it will help maximize our 1-on-1 time together.

The ability to follow assignment instructions and to correctly download, print, and prepare a loan package is a critical skill for a notary signing agent. You must call me ASAP if something happens and you are unable to download or print the sample loan package so that I may have sufficient time to either help you troubleshoot the issue, or print you an extra set of loan documents for you and bring it with me when we meet (or to mail to you, if we are meeting online via Zoom). Call me also if you are going to be late so that we can make adjustments if possible. **Unless I hear from you, the expectation is that you shall be fully prepared and on time.**

****WATCH NSA 101 VIDEOS ON [YOUTUBE](#):**

NSA 101 Workshop, **Part 1** of 3: <https://youtu.be/QqE2mHtSZBM>

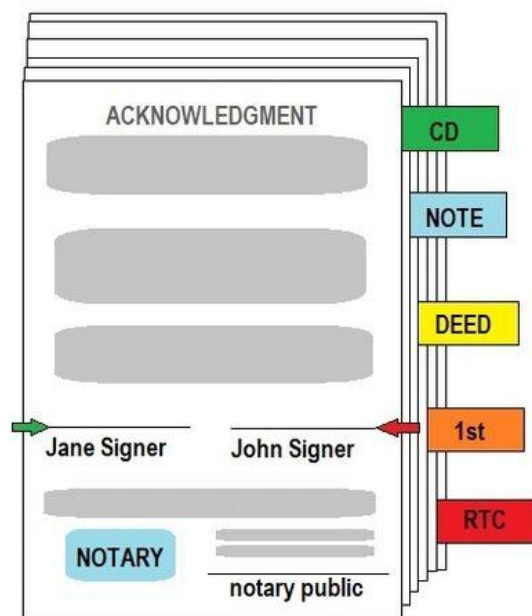
NSA 101 Workshop, **Part 2** of 3: <https://youtu.be/wJ9MI72j9KU>

(Part 3 of 3 is presenting the loan package & Q&A, which we shall do when we meet)

****REVIEW NOTARY REFERENCE MATERIALS:**

1. **The Washington State Notary Handbook** (*or read the notary handbook for your state*):
<https://www.dol.wa.gov/business/notary/docs/notary-handbook.pdf>
2. **2020 NNA Notary Public Code of Professional Responsibility**:
<https://www.nationalnotary.org/file%20library/nna/reference-library/code-of-professional-responsibility-2020.pdf>
3. **Notary Signing Agent Code of Conduct**:
<https://spswg.files.wordpress.com/2016/02/spw-code-of-conduct-2016.pdf>
4. **Signing Presentation Guidelines**:
<https://spswg.files.wordpress.com/2016/02/spw-signing-presentation-guidelines-2016.pdf>

****PRINT/PREPARE THE SAMPLE LOAN PACKAGE:**



I assume you already have your printer set up and ready to print. **Next, you will need 2 medium metal binder clips, a Black Sharpie pen, and several sets of repositionable multi-colored BLANK Post-it Arrow Flags and repositionable multi-colored Tabs** from your local office supply store to help you prepare the sample loan package as instructed. (Click through the [NSA 101 photo gallery](http://www.nsa101.com) at www.nsa101.com for examples of the tabs/arrows I recommend and to see what your sample loan package should ultimately resemble.)

- ➔ **Print 2 COPIES** of the 140-page 2021 sample refinance loan package (single-sided, never print documents on both sides.) One set of loan documents is for the signers to keep for their records; the other set is to execute with the signers and return to the hiring company as instructed. You are expected to review each printed page to make sure it has printed clearly; make sure nothing is cut off. Keep each set of loan documents in order by securing each package with a metal binder clip.
- ➔ For both sets of loan documents, apply labeled tabs to the **Closing Disclosure (CD)**, **Note**, **Deed**, **1st Payment Letter (1st)**, and the **Notice of Right to Cancel (RTC)** for quick access during the signing. Stagger the labeled tabs on the **RIGHT SIDE** of the documents, so that each tab is visible when the metal binder clip is on the loan package. *This will help you to locate important documents quickly, instead of frantically digging through an entire loan package.*
- ➔ In one set of loan documents, apply the BLANK colored signature arrow flags where borrower signatures and/or your notarizations are required.
- ➔ Choose one arrow color for Mr. Signer (such as RED) and another contrasting arrow color for Mrs. Signer (such as GREEN). Be consistent to avoid confusion for the signers. Use the same arrow color for each signer throughout the loan package. Position the arrows so that they are pointing as shown in the image above, so that part of the arrow sticks out on the margin. I can explain that later.

- ➔ Apply a BLUE arrow flag labeled "NOTARY" on each place your notarization is required. Apply a YELLOW arrow flag labeled "COMPLETE" or "CHOOSE", on the documents where the signers are expected to answer a question or must make a choice. If you make this your habit, especially when you are first starting out as a notary signing agent, it speeds up the signing and reduces chance of missing a signature or notarization, etc.

****CALL ME 360-280-0888 AS SOON AS YOU RECEIVE your sample refinance loan package. This call is to **confirm** that you have received the loan package I sent you, so that we can **discuss the training assignment**, and so we can do a couple helpful **role-play training exercises**. I will walk you through it.**

If I am busy and your call goes to VM, leave me a message. I will call you back ASAP.

Call again later on, if you need help understanding the loan prep portion of the training assignment. Detailed assignment instructions like this sometimes makes a task seem more complicated than it is. Allow yourself sufficient time to get through the loan prep portion of the training assignment. You will thank me later.

We will discuss and review the loan package during our scheduled training session, but you must first attempt to prepare it on your own as this is a very critical part of your training. Do the best you can. Call me if you need to. Write down your signing agent questions as they arise and bring any unanswered questions with you to our training session so we can get those answered for you.

****When you have successfully prepared the sample loan package for our training session, you can then print/review PRE-WORKSHOP DOCS and POST-WORKSHOP DOCS. Feel free to bring with you especially if you have any questions about them. (It is OK to staple these together – just don't staple any loan documents.)**

After our training session ends, we will set a time for our follow-up phone call. This will be another opportunity for you to ask questions. We will role-play a final time, then I will ask you questions based on our [training objectives](#) which you may use any notes to answer. When we are finished, we will exchange feedback and then I will email your NSA 101 training certificate.

I am excited to share my practical NSA 101 training with you and answer your signing agent questions. I want to help as you prepare for your career as a NOTARY SIGNING AGENT! ~Carmen Lane