

NSA 101 Webinar

HOW TO PRESENT LOAN DOCUMENTS

by Carmen Lane

THIS WEBINAR IS AN ABBREVIATED VERSION OF THE FULL-DAY NSA 101 WORKSHOP
I use the sample refinance loan package that I use in my workshop

Hiring company: **XYZ SIGNING SERVICES LLC**

Lender: **BETA FINANCIAL**

Title: **Alpha Title & Escrow**

MY FEE: \$XXX. I have been hired by XYZ Signing Services LLC to do a refinance loan signing on behalf of Beta Financial and Alpha Title & Escrow for John and Jane Signer in Finite, WA. No scanbacks required; borrowers are to provide \$945 cash to close in form of cashier's check made out to xxx.

JANE A. SIGNER and JOHN Q. SIGNER
123 CASCADE STREET, FINITE, WA 99999
555-555-1212

CONFIRMATION PHONE CALL WITH SIGNERS:

- ✓ Identify myself and why I am calling
- ✓ Confirm NAMES and that both signers will be present
- ✓ Confirm both signers have two (2) forms of valid government issued ID
- ✓ Confirm both signers will be able to print photocopies of their IDs (front and back)
- ✓ Confirm signing location address
- ✓ Confirm borrowers are aware of cash to close requirement and will have cashiers check ready
- ✓ Confirm COVID-19 PRECAUTIONS: I will wear mask/gloves; suggest signing take place in garage if borrowers are worried/concerned. Whatever makes them feel most safe and so that loan paperwork is not affected by wind/adverse weather. For the signing, I require only a large, clean table/workspace that is well lit (chairs).
- ✓ Give them my cell # in case they need to reach me in an emergency

DISCLAIMER: This mock refinance loan package is a work of fiction, created and intended for training purposes only. Do not copy, rebroadcast or distribute in whole or in part without first obtaining prior written permission. I am a notary public in Washington state #176228. I am not licensed attorney. I am not a financial, mortgage, title, or real estate expert. If there is any conflict for you between what I am saying/suggesting in this or any workshop or webinar and what the law in your area states, it is not intentional, and you must of course *follow the law*. Always, always follow the law. Notaries are responsible for knowing their duties and for abiding by the ethics, rules, and laws of their chosen profession. All opinions are my own.