

NOTARY CLIENT PREP SHEET

Everything you need to know to prepare for your notary appointment — so we can get it right the first time.

Common Documents We Notarize

- **Affidavits** — Sworn written statements used in legal proceedings (heirship, identity, residence, small estate)
- **Powers of Attorney (POA)** — Grants legal authority to act on someone's behalf (financial, medical, durable, limited)
- **Real Estate Documents** — Deeds, property transfers, lien releases, homestead declarations
- **Trusts & Estate Documents** — Trust agreements, trust amendments, beneficiary designations
- **Wills & Testaments** — Last will and testament, self-proving affidavits for wills
- **Medical & Healthcare Directives** — Advance directives, living wills, medical power of attorney, HIPAA authorizations
- **Business Documents** — Articles of incorporation, operating agreements, partnership agreements, corporate resolutions
- **Financial Documents** — Promissory notes, bill of sale, debt agreements
- **Family & Personal Documents** — Consent forms for minor travel, custody agreements, name change petitions, immigration documents
- **School & Enrollment Documents** — Transcript requests, vaccination exemptions, enrollment affidavits

- **Vehicle & Title Documents** — Vehicle title transfers, VIN inspections (where applicable)

Not sure if your document needs notarization? Contact us — we're happy to help you determine the right service.

What to Bring to Your Appointment

- **Your unsigned document(s)** — Do NOT sign before the appointment. The notary must witness your signature.
- **Valid, unexpired government-issued photo ID** — Driver's license, state-issued ID, U.S. passport, or military ID
- **All pages of your document** — Ensure nothing is missing. Loose or incomplete documents cannot be notarized.
- **All required signers** — Every person who needs to sign must be physically present with their own valid ID
- **A secondary form of ID** (recommended) — In case additional verification is needed
- **Any supporting documents** referenced in the main document (e.g., property descriptions, exhibits, attachments)
- **Payment** — Have your notary fee ready (cash, Zelle, or other accepted payment methods)

Identification Requirements

Accepted forms of ID: Valid (unexpired) driver's license, state-issued ID card, U.S. passport or passport card, military ID issued by the U.S. Department of

Defense

- The name on your ID must match the name on the document being notarized — **exactly**.
- If your name has changed (marriage, divorce, legal name change), bring supporting documentation (marriage certificate, court order).
- Expired IDs cannot be accepted under any circumstances.
- If you do not have acceptable ID, contact us before the appointment to discuss alternatives (credible identifying witnesses may be an option in some states).
- All signers must present their own individual ID — one ID cannot cover multiple people.

⚠ Important Rules to Know

- **Do NOT sign your document before the appointment.** The notary must witness you sign. Pre-signed documents cannot be notarized.
- **The notary cannot provide legal advice.** We can notarize your documents, but we cannot explain legal terms, help you fill in blanks, or advise you on what a document means. Consult an attorney for legal guidance.
- **The notary cannot prepare documents.** Bring your documents already completed (except for signature lines). We do not draft, edit, or fill in documents for you.
- **All signers must be present.** We cannot notarize a document for

someone who is not physically in front of us (unless conducting a legally authorized Remote Online Notarization session).

- **You must be signing willingly.** The notary will confirm that you understand what you are signing and are not being coerced or pressured.
- **Blank documents cannot be notarized.** All substantive fields must be completed before the appointment. Do not leave blanks other than the signature and date lines.
- **Certain documents may require witnesses.** Some documents (e.g., wills, advance directives) require one or two witnesses in addition to notarization. Confirm witness requirements before your appointment and arrange for witnesses to be present.

How to Prepare Your Documents

- Complete all fill-in fields before the appointment — name, address, dates, property descriptions, etc. Leave only signature and date lines blank.
- Print documents single-sided for easy review and signing.
- If your document has multiple pages, make sure they are in order and numbered.
- Check that the document includes notarial language (e.g., "acknowledged before me," "sworn and subscribed"). If it does not, let us know — we carry standard acknowledgment and jurat certificates.

Know what type of notarization you need:

Type	Description
Acknowledgment	Confirms you are the person signing and you signed voluntarily. This is the

Type	Description
	most common type of notarization.
Jurat (Oath/Affirmation)	You swear or affirm under penalty of perjury that the contents of the document are true. Used for affidavits and sworn statements.
Certified Copy	A notarized copy of an original document. Availability varies by state.

If you are unsure which type of notarization is required, contact us or consult the party requesting the document.

Appointment Location & Scheduling

Appointment Date:

Appointment Time:

Location:

- We offer **mobile notary services** — we come to you (home, office, hospital, care facility, or other location).
- Please confirm your appointment **24 hours in advance**.
- If you need to reschedule, provide at least **4 hours' notice**.
- For hospital, nursing facility, or care facility signings, please notify staff that a notary will be visiting and confirm the signer's ability to participate.
- Gated communities: Please provide gate codes or arrange guest entry in advance.

Parking instructions or special access notes:

Fees & Payment

- Notary fees are based on the type and number of notarial acts performed, plus travel (for mobile appointments).
- **Standard notary fee per signature/seal:** As allowed by Texas state law (currently up to \$6 per notarial act, though additional service fees may apply for mobile travel).
- **Travel fee:** Varies based on distance and location — confirmed at the time of booking.
- **Accepted payment methods:** Cash, Zelle, CashApp, Venmo, or other methods as arranged.
- Payment is due at the time of the appointment.
- A fee quote will be provided when you schedule your appointment — no surprises.

For multi-document or bulk notarization needs, contact us for a custom quote.

After Your Appointment

- You will receive your notarized document(s) immediately after the appointment.
- Keep your original notarized documents in a safe, secure location.
- Make copies for your records, but remember — the **original** notarized document is the legally valid version.
- If your document needs to be filed (e.g., with a county clerk, court, or government agency), you are responsible for filing unless other arrangements have been made.
- If you need additional certified copies or re-notarization, contact us to schedule a follow-up appointment.

- Notarized documents do not expire unless the document itself contains an expiration clause — however, some receiving parties may require documents notarized within a certain timeframe (e.g., 30 or 90 days).

? Frequently Asked Questions

Q: Can you notarize a document that's already been signed?

A: No. The notary must witness the signing. If you've already signed, you may need to re-sign in our presence, depending on the document type.

Q: Can someone else sign on my behalf?

A: Only if they hold a valid, notarized Power of Attorney authorizing them to do so. The POA must be presented at the appointment.

Q: Do you offer Remote Online Notarization (RON)?

A: Yes — for clients who cannot meet in person, we offer RON sessions conducted via secure video call in compliance with Texas law. Contact us for details.

Q: What if my name on the document doesn't match my ID?

A: Contact us before the appointment. Minor variations may be acceptable, but significant discrepancies will need to be resolved before notarization can proceed.

Q: How many witnesses do I need?

A: It depends on the document. Wills typically require two witnesses. Advance directives may require one or two. Check your document's requirements or ask us when scheduling.

Q: Can you notarize documents in a language other than English?

A: The notary must be able to communicate directly with the signer. If the document is in another language, the signer must understand its contents. An interpreter may be used in some cases — contact us to discuss.