

Estate Planning Notary Checklist



- ❑ Confirm valid government-issued ID from all signers.
- ❑ Ensure signer is willing and mentally competent to sign.
- ❑ Review the document type (POA, Will, Trust, etc.) to understand the notarial act required.
- ❑ Check for any required witnesses based on the type of document and your state laws.
- ❑ Verify signer's understanding of the document without giving legal advice.
- ❑ Complete your notary journal entry (date, document type, signer's name, ID details, and thumbprint if required).
- ❑ Select and complete the correct notarial certificate (Acknowledgment or Jurat).
- ❑ Affix your notary seal and sign the document.
- ❑ Return original documents securely to the client or attorney.
- ❑ Offer copies or storage tips (if allowed in your role and state).
- ❑ Discuss mobile or remote online notary (RON) options for future estate document needs.

For More Information
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