5 Essential Steps of Notarization

Amity DeJong, Lead Seminar Instructo
Objectives

- Practice essential steps of notarization
- Correctly complete journal entries
- Interpret and complete certificates
- Improve skills
- Feel prepared to serve public
Notary/Signer Relationship

The Notary:

• Screens for willingness and awareness
• Authenticates signer’s identity
• Verifies signer’s signature
• Compels signer to truthfulness
5 Essential Steps

1. Require personal appearance
2. Check document and certificate
3. Identify and screen signer
4. Complete journal entry
5. Fill in, sign, seal the certificate
Acknowledgment

The signer:
• Appears in front of Notary
• Identified by Notary
• “Acknowledges” having signed document
Jurat or Verification on Oath

The signer:
• Appears in front of Notary
• Identified by Notary
• Signs document in front of Notary
• Swears to truthfulness of document
Professional Practices

• Use reasonable care
• Avoid unauthorized practice of law:
  *DO NOT choose notarization
  *DO NOT give advice
  *DO NOT fill in document blanks
• Refer signers as appropriate
Scenario Directions

1. Look over document and certificate
2. Check identification of signer(s)
3. Perform acknowledgment or jurat
4. Complete journal entry (charge $X.00)
5. Complete certificate
Scenarios

Scenarios take place at your office:

9 Notary Street
Notarycity, Notarystate, 12345
Notarycounty
Scenario 1

- Sarah Signer appears at your office with a Power of Attorney dated May 25, 2016, and asks you to notarize her signature on it.

- The document is complete except for Sarah’s signature.

- It has Notary wording acceptable in your state.

- Sarah clearly is signing the document willingly and is aware of what’s going on.

- Sarah presents her driver’s license as ID.

- The address on the ID is current.
Scenario 1

<table>
<thead>
<tr>
<th>Month/Day/Year/Time of Notarization</th>
<th>Kind or Type of Notarization/Certificate</th>
<th>Address Where Notarization Performed</th>
<th>Document Kind or Type/Date</th>
<th>Name and Address of Signer</th>
</tr>
</thead>
<tbody>
<tr>
<td>Today’s date and time</td>
<td>Acknowledgment</td>
<td>My Office, 9 Notary Street, Notarycity, NS 12345</td>
<td>power of Attorney - special</td>
<td>Sarah Signer 456 Signer Street Signerville, AZ 88888</td>
</tr>
</tbody>
</table>

Identification of Signer

<table>
<thead>
<tr>
<th>Personally Known by the Notary</th>
<th>Additional Information</th>
<th>Notary Fee</th>
<th>Signature of Signer</th>
<th>Right Thumbprint of Signer</th>
</tr>
</thead>
<tbody>
<tr>
<td>X ID Cards — Describe each card below</td>
<td>Signer is willing &amp; aware</td>
<td>$0.00</td>
<td>[Signature] Sarah Signer</td>
<td>[Thumbsprint]</td>
</tr>
<tr>
<td></td>
<td>AZ DL; AZ DMV exp. 10/07/39; #D00363370</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Scenario 1

State of **Notary State**

County of **Notary County**

On this *(date)* day of *June, 2017*, before me *(your printed name)*, Notary Public, personally appeared *Sarah Signer*, whose identity(ies) was/were proven to me on the basis of satisfactory evidence to be the person(s) who he/she/they claim(s) to be, and acknowledged that he/she/they signed the above/attached document.

*Your Official Signature*

Notary Signature  
(Seal)
Scenario 2
• Simon Signer arrives at your office with an insurance affidavit for items that were stolen from his house.
• The document is complete, except for Simon’s signature, is dated today, and has certificate wording that is acceptable in your state.
• Simon clearly is signing willingly and is aware of what’s going on.
• Simon presents his driver’s license as ID.
• The address on the ID is current.
Scenario 2

<table>
<thead>
<tr>
<th>Month/Day/Year/Time of Notarization</th>
<th>Kind or Type of Notarization/Certificate</th>
<th>Address Where Notarization Performed</th>
<th>Document Kind or Type/Date</th>
<th>Name and Address of Signer</th>
</tr>
</thead>
<tbody>
<tr>
<td>Today's date and time</td>
<td>Jurat/Verification by Oath or Affirmation</td>
<td>My Office, 9 Notary Street, Notary City, Ns 12345</td>
<td>Florida Insurance Affidavit</td>
<td>Simon B. Signer 456 Signer Street Signerville, FL 33333</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Identification of Signer</th>
<th>Additional Information</th>
<th>Notary Fee</th>
<th>Signature of Signer</th>
</tr>
</thead>
<tbody>
<tr>
<td>FL DL; FL DMV Exp. 3/26/18</td>
<td>Signer is willing &amp; aware</td>
<td>$1.00</td>
<td>SIMON SIGNER</td>
</tr>
</tbody>
</table>
Scenario 2

State of **Notary State**
County of **Notary County**

Subscribed and sworn (or affirmed) on this **(date)** day of **June, 2017**, by **Simon Signer**, whose identity(ies) was/were proven to me.

Your Official Signature

Notary Signature (Seal)
Scenario 3

- Claudia Pastorelli and Fred Fiancé have a Prenuptial Agreement that they have both signed.
- The document is dated May 16, 2015, and has preprinted certificate wording that is acceptable in your state.
- Both have acceptable ID documents.
- Claudia’s address is:
  
  22 Elm Street
  Anytown, Anystate 44444
## Scenario 3

<table>
<thead>
<tr>
<th>Month/Day/Year/Time of Notarization</th>
<th>Kind or Type of Notarization/Certificate</th>
<th>Address Where Notarization Performed</th>
<th>Document Kind or Type/Date</th>
<th>Name and Address of Signer</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Today’s date and time</td>
<td>Acknowledgment</td>
<td>My Office, 9 Notary Street, Notary City, NS 12345</td>
<td>Prenuptial Agreement, May 16, 2016</td>
<td>Fred Fiance, 777 Oak Street, Anytown, Anystate 44444</td>
</tr>
<tr>
<td>2</td>
<td></td>
<td></td>
<td></td>
<td>Claudia L. Pastorelli, 22 Elm Street, Anytown, Anystate 44444</td>
</tr>
</tbody>
</table>

### Identification of Signer

- **Personally Known by the Notary**
  - ID Cards — Describe each card below
  - Credible Witnesses(es) — Include signature of each witness
- **AZ DL; AZ DMV**
  - Exp 5/01/32; #D000363370
- **US Passport DOS**
  - Exp 11/16/20; #333333333

### Additional Information

- Signer asked about willingness/awareness
  - Signer asked about willingness/awareness
  - ID name: Claudia Louise

### Notary Fee

- $0.00
- $0.00

### Signature of Signer

- **FRED FINANCE**
- **CLAUDIA L. PASTORELLI**

### Right Thumbprint of Signer

- Top of Thumb here
- Top of Thumb here
Scenario 3

State of Notary State
County of Notary County

This document was acknowledged before me on this (date) of (June), 2017, by Claudia L. Pastorelli and Fred Fiance (name[s] of principal[s]).

Your Official Signature

Notary Signature

(Seal)
Scenario 4

- Clint Sample asks you to notarize his letter of consent so his daughter can travel to Canada.
- Clint clearly is signing the document willingly and is aware of what’s going on.
- For ID, Clint presents his driver’s license that contains his current address.
- Clint says that he was told to sign the document in front of you and swear to it’s truthfulness.
## Scenario 4

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<thead>
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<th>Document Kind or Type/Date</th>
<th>Name and Address of Signer</th>
</tr>
</thead>
<tbody>
<tr>
<td>today's date and time</td>
<td>Jurat</td>
<td>My Office, 9 Notary street, Notary City, NS 12345</td>
<td>Letter of consent to Travel</td>
<td>Clint Sample 2120 Sun Valley Drive Anytown TX 12345-8413</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Identification of Signer</th>
<th>Additional Information</th>
<th>Notary Fee</th>
<th>Signature of Signer</th>
<th>Right Thumbprint of Signer</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tx DL; TX DMV</td>
<td>signer is willing &amp; aware</td>
<td>$X.00</td>
<td>Clint Sample</td>
<td></td>
</tr>
</tbody>
</table>

Exp. 8/15/18 #12345678
Scenario 4

State of Notary State
County of Notary County

Subscribed and sworn to (or affirmed) on this \textit{(date)} day of \textit{June}, 2017, by Clint Sample

whose identity(ies) was/were proven to me.

\textbf{Notary Seal}

Your Official Signature

Notary Signature (Seal)
Scenario 5

• Tammie Ang requests notarization of a Grant Deed for a property owned by her & her sister.
• You notice the document is dated February 23, 2004.
• It’s complete except for two blank signature lines: one for Tammie & one for her sister, Ruby K. Ang, who is not here.
• The certificate is acceptable in your state, but you notice that the certificate says, “personally appeared Ruby K. Ang & Tammie Ang.”
• Tammie presents her driver’s license & clearly is signing willingly and is aware of what’s going on.
## Scenario 5

<table>
<thead>
<tr>
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<th>Document Kind or Type/Date</th>
<th>Name and Address of Signer</th>
</tr>
</thead>
<tbody>
<tr>
<td>Today’s date and time</td>
<td>Acknowledgment</td>
<td>My Office, 9 North Street, Notary City, KS 12345</td>
<td>Grant Deed</td>
<td>Tammie Ang 123 North Street Apt. 2</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Identification of Signer</th>
<th>Additional Information</th>
<th>Notary Fee</th>
<th>Signature of Signer</th>
<th>Right Thumbprint of Signer</th>
</tr>
</thead>
<tbody>
<tr>
<td>KS DL; KS DMV</td>
<td>Signer is willing &amp; aware</td>
<td>$0.00</td>
<td>Tammie Ang</td>
<td>X (thumbprint)</td>
</tr>
</tbody>
</table>

Exp. 11/15/16 #K12-34-5678
State of Notary State

County of Notary County

On (today’s date), before me, (your printed name), Notary Public, personally appeared Tammie Ang and Ruby K. Ang, personally known to me (or proved to me on the basis of satisfactory evidence) to be the person(s) whose name(s) is/are subscribed to the within instrument and acknowledged that he/she/they executed the same in his/her/their authorized capacity(ies), and that by his/her/their signature(s) on the instrument the person(s), or the entity upon behalf of which the person(s) acted, executed this instrument.

WITNESS my hand and official seal.

Your Official Signature  Notary Seal

Notary Signature  (Seal)
Scenario 6

• Joe Sample brings a Durable Power of Attorney to you for notarization.
• Everything is in order.
• The document is dated a couple of days ago, it has certificate wording that’s acceptable in your state, Joe’s signature is original, he’s willing and aware, his driver’s license is correct.
• You then notice the venue on the certificate says, “Idaho.” That’s where Joe had the POA drawn up, but you are NOT an Idaho Notary!
## Scenario 6

<table>
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<th>Document Kind or Type/Date</th>
<th>Name and Address of Signer</th>
</tr>
</thead>
</table>

Identification of Signer: ID DL; ID DMV

Additional Information: Signer is willing & aware

Notary Fee: $0.00

Signature of Signer: Joe Sample

Right Thumbprint of Signer: [Thumbprint Image]
Scenario 6

State of Idaho  
Notary State (Your initials)

County of Notary County  

On this the (date) day of June, 2017, the principal, Joe Sample, personally appeared before the undersigned officer and acknowledged to me that he/she/they executed the foregoing document in my presence for the purposes therein contained.

Your Official Signature

Notary Signature

(Seal)

Notary Seal
Wrap Up

• Follow 5 essential steps of notarization
• Properly identify signers
• Use reasonable care
• Avoid unauthorized practice of law
• Call the NNA Hotline for help
Thank You!

• Questions?
• Presenter contact info:
  Amity DeJong
  Lead Seminar Instructor
  adejong@nationalnotary.org