

Notary Intake Call Checklist

Client Information

Name: _____

Phone: _____

Email: _____

Appointment Details

Appointment Date: _____

Appointment Time: _____

Meeting Address: _____

Location: ☐ Home ☐ Office ☐ Hospital ☐ Nursing Home ☐ Jail/Correctional Facility

☐ Other: _____

Special Instructions *Gate code, check-in required, etc.*

Document Information

Number of Documents: _____

Number of Signers: _____

Required Notarial Act: ☐ Acknowledgment ☐ Jurat ☐ Oath/Affirmation

☐ Signature Witnessing ☐ Don't Know

Witness Required: ☐ Yes ☐ No

Fees & Payment

☐ Notarization fee discussed

☐ Travel fee discussed

Estimated Total: \$_____

Payment Method: ☐ Cash ☐ Credit/Debit ☐ Venmo ☐ Zelle ☐ Check

☐ Other: _____

Before Ending the Call

☐ Appointment confirmed

☐ Confirmed client can provide acceptable form(s) of ID

☐ Client reminded **not to sign** the document beforehand (if applicable)

☐ Client reminded all signers must be present