

# 4 STEPS

## TO TAKE IF A CLAIM IS FILED AGAINST YOU

1



### CONTACT YOUR BOND OR E&O INSURANCE CARRIER

If you are informed of a claim against your bond or E&O insurance policy, immediately contact your bond or insurance carrier. They will handle the case.

2



### LOCATE YOUR JOURNAL AND BE SURE TO DOCUMENT EVENTS

Your journal contains key evidence that will help your case. It shows that you adhered to laws and best practices. It's also a good idea to document the notarization independent from your journal, recalling details including those present, the location, dates, timelines, circumstances, and anything else pertinent. Collect copies of documents and related records. This will help when your surety carrier or insurer asks for a statement.

3



### DON'T TALK TO OPPOSING COUNSEL

If contacted by an attorney other than your own, do not say anything regarding the notarization in question or tell the opposing attorney to contact your insurance company. Never initiate contact with opposing counsel. Your statements are ammunition for the opposition to use against you, and you should only communicate with your own lawyer or with the bonding or insurance company's representative. Disclosing information could harm your chances of resolving the claim free of financial loss.

4



### COOPERATE WITH YOUR ATTORNEY

Your attorney is an expert on Notary claims and is working on your behalf. It's in your best interest to fully cooperate and supply them with accurate, relevant information. The more you cooperate and disclose, the more likely it is that your attorney can prevent any financial loss.