

Financial Identity Verification Checklist

Prepared for Financial & Banking Notary Appointments

This checklist is designed to help individuals prepare for financial and banking-related notarization appointments. Use this guide to organize identification, documents, and appointment requirements before meeting with a notary.

Identification Preparation

- Bring valid government-issued photo identification
- Ensure the ID matches the signer name on the document
- Verify the ID is available before the appointment begins
- Prepare identification for all required signers
- Have secondary supporting documents available if requested

Financial Document Preparation

- Review all financial or banking documents before the appointment
- Do not sign documents early unless instructed
- Verify all pages are included in the package
- Separate unsigned and completed documents
- Confirm any lender or bank instructions

Appointment Readiness

- Confirm appointment time and location
- Ensure all signers are present
- Prepare witnesses if required
- Provide a quiet signing environment
- Have contact information available for lender, attorney, or title company

Remote Online Notary (RON) Preparation

- Test camera and microphone before the session
- Upload documents if required
- Ensure stable internet connection
- Prepare identification for online verification
- Join the session from a secure location

Security & Document Handling

- Keep financial documents secure during transport
- Avoid sharing sensitive information publicly
- Use secure document upload methods when possible
- Follow all document return instructions carefully
- Store completed notarized documents safely

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