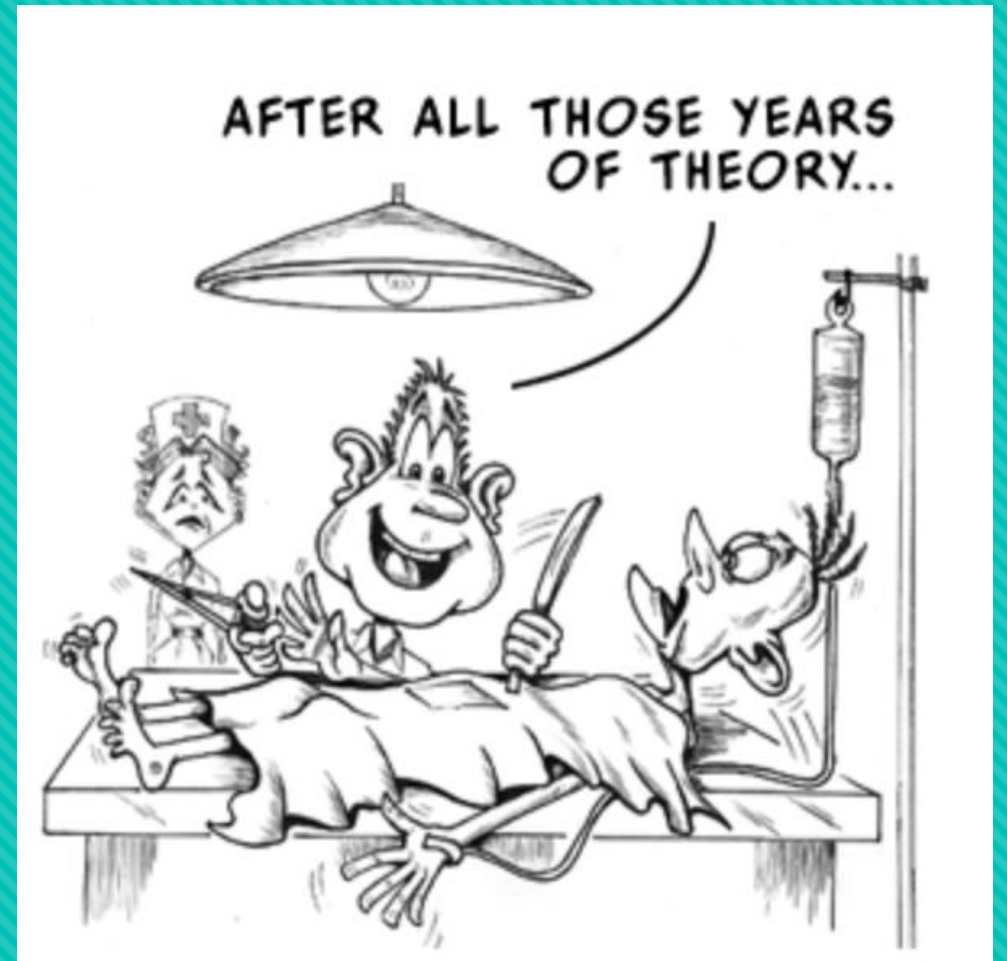


Notarology 201: Applying the HOW To The WHAT



**IN THEORY,
NOTARY IS EASY**

**IN PRACTICE,
IT'S ANYTHING BUT**

HOW TO PERFORM THE SIX STEPS TO A PERFECT NOTARIAL ACT

1. REQUIRE PERSONAL APPEARANCE

- Be Firm
- Be Professional
- Suggest Alternate Time / Location
- Refuse to Perform Notarization
- Don't do "favours" for friends/family

HOW TO PERFORM THE SIX STEPS TO A PERFECT NOTARIAL ACT

2. REVIEW THE DOCUMENT

- Determine the type of document
- Determine who is supposed to sign & capacity
- **Determine the type of notarial act to perform**

EXERCISE 1

State of Montana

County of _____

SUBSCRIBED and AFFIRMED before me this _____ day of _____,
20_____ by _____.

Notary Signature

[Seal/Stamp]

What type of notarial act does this call for? Jurat

State of Colorado

County of _____

_____ signed this record before me this
_____ day of _____, 20____.

[Seal/Stamp]

Notary Signature

What type of notarial act does this call for? Signature Witnessing

On _____, in the State of _____, County of _____,
_____ personally appeared to
me, and submitted these documents as proof of identity

Witness my hand and official seal:

Notary Public

[Seal/ Stamp]

What type of notarial act does this call for? **There is no notarial act indicated**

State of Montana

County of _____

On this _____ day of _____, 20____, before me personally appeared _____
_____, known to me to be the person named in the above record, who did
declare under oath that the information stated above is true and correct to the best of their information
and belief, and now acknowledges they signed in my presence of their own free will.

Notary Signature

[Seal/Stamp]

What type of notarial act does this call for? Hybrid – Jurat and acknowledgment

State of _____

County of _____

On _____, before me, _____, a Notary Public, personally appeared _____, testator, and _____ and _____, witnesses, who were personally known to me or who proved on the basis of satisfactory evidence to be the persons whose names are subscribed to the within instrument and acknowledged to me that they executed the same in their indicated capacities and that by their signatures on the instrument do attest they have executed the same.

[Seal/Stamp]

Notary Signature

What type of notarial act does this call for? Acknowledgment

By signing this document, in the state of _____, county of _____ I certify that I am a licensed notary under laws and regulations of the state or county for which I am performing my notarial duties, that I am not related to the above affiant, that I have personally witnessed him/her sign this document, and that I have properly verified the identity of the affiant by viewing the above notated identification document and the matching photocopy.

Signature of Notary _____ Date of Notarization _____

[Seal/Stamp]

What type of notarial act does this call for? Signature Witnessing

State of _____ County of _____ on _____, 20____,
_____ personally appeared before me and I identified him/her on the basis
of personal knowledge or satisfactory evidence and notarized his signature as it appears above.
Witness my hand and official seal.

What type of notarial act does this call for? There is no notarial act indicated

(“Notarize” is not a notarial act!)

State of Montana

County of _____

This record was signed and sworn to before me by use of communication technology on _____
by _____ who declared that _____ is located in _____ at the time this
notarial act is being performed and that this record is part of or pertains to a matter that is to be filed with or is
before a court, governmental entity, or other entity located in the United States or involves property located in or
a transaction substantially connected with the United States.

[Seal/Stamp]

Notary Signature

What type of notarial act does this call for? Jurat

HOW TO PERFORM THE SIX STEPS TO A PERFECT NOTARIAL ACT

3. IDENTIFY THE PRINCIPAL

- **Goal:** Match the name on document to person appearing to you
 - Personal Knowledge
 - Satisfactory evidence

EXERCISE 2

Your new co-worker, Drew Sample, asks you to notarize his car title which shows the owner's name as Andrew J. Sample. His Pennsylvania driver's license shows his name as Andrew Jason Sample.

Can you use this ID for this notarization?

How should you enter his name on the notarial certificate?



You have been presented with a contract to be signed by Brenda Sample Nelson.

The person appearing to you is a middle-aged woman with dark brown hair, average height and weight who presents this driver's license:

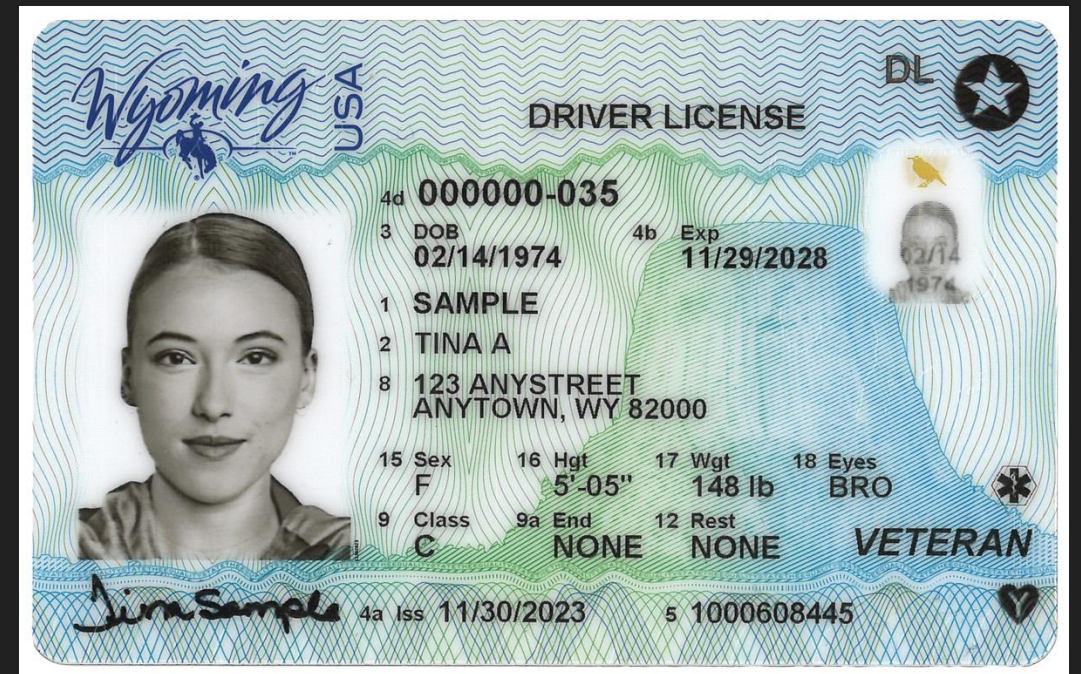
She explains that she recently got married.



- Could you use this license in your state?
- What would you need to complete this notarization?

You work in a medical clinic and have been asked to take an acknowledgment of one of the doctors, Tina Armstrong Sample, who signed the document with her usual illegible scratch. You've worked there for several months and feel like you know all of the staff, including Dr. Sample, although you didn't know her middle name.

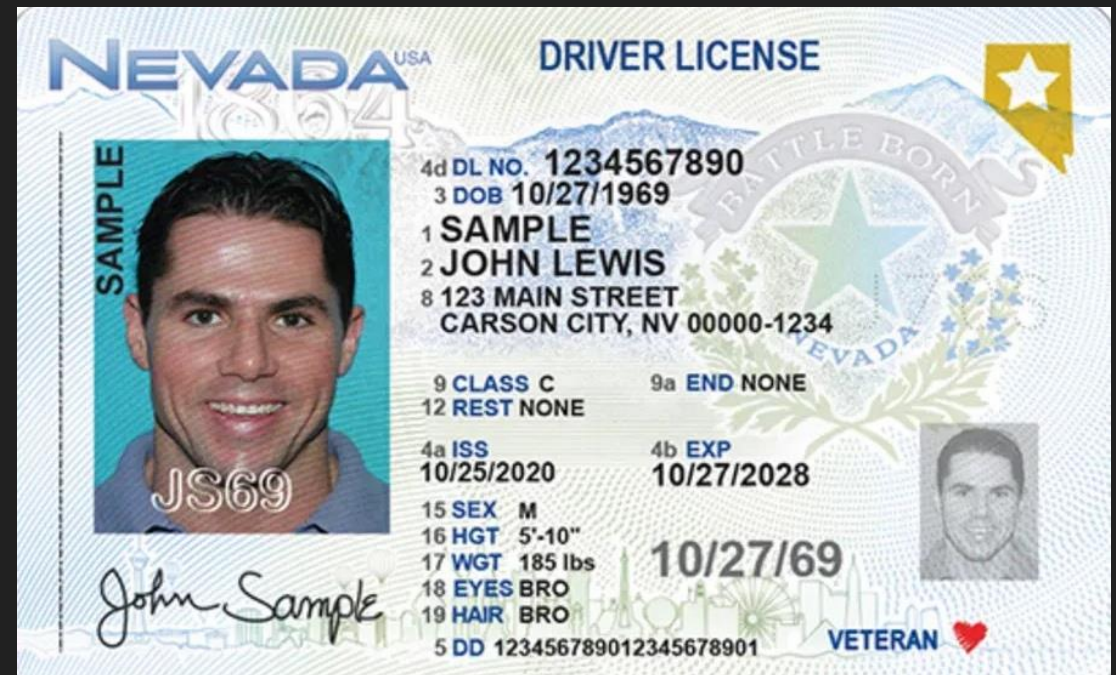
- Do you need to see her ID?
- Will this ID suffice?
- How could you verify her middle name?
- What name do you enter in the certificate?



A customer you have worked with a number of times is buying a new car and asks you to notarize a loan agreement for the bank. The loan is in the name John Lewis Sample, Sr. The customer presents a current ID in the name of John Lewis Sample.

You know he has a son John, but you don't know if he is a "Jr."

- What do you need to complete this transaction?



A girl of about 14 comes in asking you to notarize a handwritten document written in Spanish, which you cannot read. The name printed on the document is Xochitl Hernandez Acosta. She gives you her Mexican passport as her ID.

Can you use a foreign passport as a legal ID credential?

What name(s) do you enter on the certificate?



Bonus Question: Can you perform a notarization for a minor?

HOW TO PERFORM THE SIX STEPS TO A PERFECT NOTARIAL ACT

4. DETERMINE COMPETENCY & INTENT

- Actions speak louder than words – pay attention
- Listen to what they say
- Verbally confirm willingness and intent

HOW TO PERFORM THE SIX STEPS TO A PERFECT NOTARIAL ACT

5. COMPLETE THE JOURNAL RECORD

- Start journal entries early
- You enter details about transaction
- Have signer enter name and address

Consider taking the workshop “Creating A Valuable Record”

HOW TO PERFORM THE SIX STEPS TO A PERFECT NOTARIAL ACT

6. COMPLETE THE NOTARIAL CERTIFICATE

- Non-compliant certificates

- Non-existent certificate

EXERCISE 3

State of Colorado

County of _____

Signed before me this _____ day of _____, 20____ .

[Seal/Stamp]

Notary Signature

State of ~~Colorado~~ Montana

County of _____

Signed before me this _____ day of _____, 20_____, by [Printed
Name of Signer].

[Seal/Stamp]

Notary Signature

1. Correct the venue where inaccurate information has been pre-completed
2. Add the name of the signer as required by 1-5-609(1)(iv), MCA

On _____, in the State of _____, County of _____,
_____, _____ personally appeared to
me, and submitted these documents as proof of identity

Witness my hand and official seal:

Notary Public

[Seal/ Stamp]

On _____, in the State of _____, County of _____,
_____, _____ personally appeared to
me, and submitted these documents as proof of identity

and signed or acknowledged* this record.

Witness my hand and official seal:

Notary Public

[Seal/ Stamp]

1. Indicate the type of notarial act - * The customer must instruct you which notarial act to perform

On this _____ day of _____, 20____, before me personally appeared _____
_____, known to me to be the person named in the above record, who did
declare under oath that the information stated above is true and correct to the best of their information
and belief, and now acknowledges they signed in my presence of their own free will.

Notary Signature

[Seal/Stamp]

State of Montana , County of Lewis and Clark

On this _____ day of _____, 20____, before me personally appeared _____
_____, known to me to be the person named in the above record, who did
declare under oath that the information stated above is true and correct to the best of their information
and belief, and now acknowledges they signed in my presence of their own free will.

Notary Signature

[Seal/Stamp]

1. Enter the venue – the state and county where the notarization was performed.

Handwrite a proper notarial certificate for a certified copy of Scooter's proof of vaccination



[Seal/Stamp]

Notary Signature

Handwrite a proper notarial certificate for a certified copy of Scooter's proof of vaccination

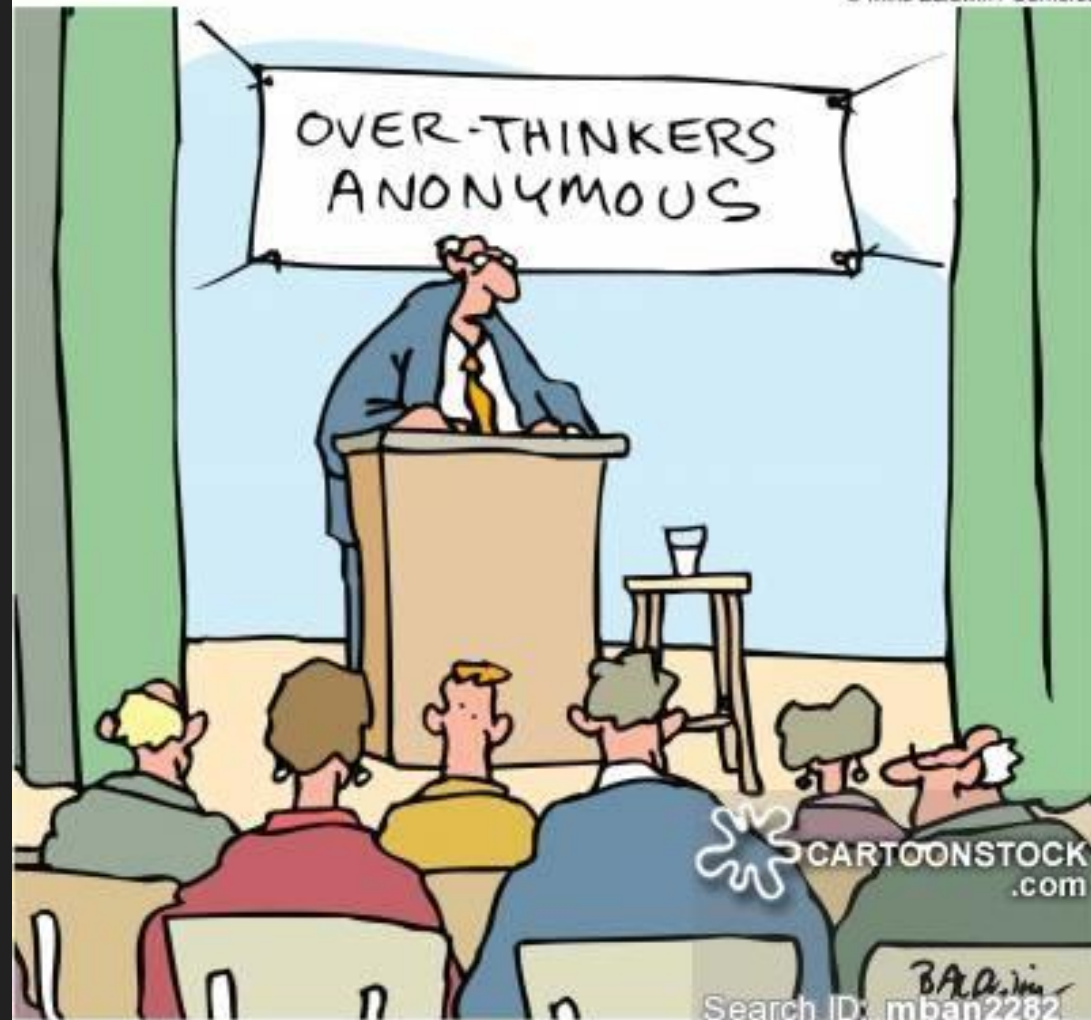


State of Montana,
County of Lewis & Clark

I certify this to be a true and correct copy of the
certificate of vaccination for Scooter made by me on
August 16, 2024.

[Seal/Stamp]

Notary Signature



"Then, 18 years ago, I had a moment of clarity. Ever since, I've been working the program, hoping for another one."

...Because notaries leave lasting impressions!

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