



Document Requirements Checklist

Use before an appointment. This is a preparation aid, not a legal determination that a document is valid.

Document type: _____ Appointment date: _____

Notary jurisdiction: _____ Property / governing state: _____

- ☐ **Identify the exact document and purpose.** Confirm the form version and intended recipient. Do not select or draft the legal instrument for the signer.
- ☐ **Find the controlling official source.** Record the applicable statute, official form instructions, court rule, or recorder requirement and date checked.
- ☐ **Separate law from policy.** Mark each requirement below as legal, recipient policy, or optional practice; do not assume notarization is always required.
- ☐ **Confirm witness requirements.** Number, minimum age, disqualifications, physical or authorized remote presence, and whether the notary may also witness.
- ☐ **Confirm the requested notarial act.** Acknowledgment, oath / verification, or another authorized act. If unclear, obtain direction from the signer, recipient, or attorney; do not choose for them.
- ☐ **Confirm appointment readiness.** Required signers, permitted ID, willingness, complete document, appropriate certificate, and lawful signing method.
- ☐ **Perform and record the actual act.** Required ceremony, signature procedure, truthful certificate, seal, journal / other record as required, and lawful fees.
- ☐ **Resolve uncertainty before proceeding.** Refer legal-effect, authority, amendment, custody, capacity, or execution questions to an attorney or appropriate official.



Requirements & Source Record

Document / appointment reference: _____

Witnesses: number, qualifications and presence

Requirement: _____

Basis: ☐ Law / official rule ☐ Recipient policy ☐ Optional practice

Source and date checked: _____

Notarization: required act or permitted alternative

Requirement: _____

Basis: ☐ Law / official rule ☐ Recipient policy ☐ Optional practice

Source and date checked: _____

Recording / recipient submission instructions

Requirement: _____

Basis: ☐ Law / official rule ☐ Recipient policy ☐ Optional practice

Source and date checked: _____

Document-specific cautions

Wills and codicils: separate execution witnesses from self-proof; a stamp alone does not validate an amendment.

Healthcare: check witness exclusions and special facility safeguards.

Deeds and mortgages: execution and recording are separate; check the property jurisdiction.

Financial forms: a notarial seal does not substitute for a required Medallion or signature guarantee.

Official reference starting points

[Texas: wills / self-proof, ch. 251](#)

[California: advance healthcare directive](#)

[Florida: conveyance witnesses, §689.01](#)

[U.S. Treasury: signature certification](#)

[Open the app for document-specific official links](#)