

FIRST SIGNING

Notary **Startup** Checklist

FREE DOWNLOAD — NO EMAIL REQUIRED

The four stages from "thinking about it" to your first paid signing — as a checklist you can actually check off. Commission, supplies, listings, first signing: in order, in plain English.

"From zero to your first paid signing." — First Signing (firstsigning.com)

STAGE

1

Commission

No commission, no notary, no business. This stage is pure paperwork — start it this week, because the state's clock only starts when you apply (typically 2-8 weeks, varies by state).

☐ **Confirm you're eligible**

18+, resident of your state, no disqualifying criminal history. Five minutes on your Secretary of State's site rules out surprises.

☐ **Find your SOS notary page (official .gov only)**

Google "[your state] secretary of state notary public". Vendor sites are commentary; the .gov page is law.

☐ **Download your state's notary handbook PDF**

Free, plain-language version of your notary law. Read the ID, journal, and prohibited-acts sections twice.

☐ **Complete required education / pass the exam (if your state requires it)**

About a third of states require training; a handful test you. The state usually offers its own low-cost option.

☐ **Submit your commission application**

Usually online. Decide now which legal name goes on the commission — it must match your ID and stamp exactly.

☐ **Buy your surety bond (if your state requires one)**

The bond protects the public, not you. Buy it during the application process where required.

☐ **Take the oath / record with the county (if required)**

In many states the commission isn't valid until recorded. This is the step beginners forget while wondering why they're "not in the system."

☐ **Verify you're active in the state notary database**

Search your name on the SOS site. If you're not listed, you're not done.

DON'T BUY THE STAMP YET

Order your stamp and journal only after the commission certificate arrives. If anything on the application changes first, a pre-bought stamp is a paperweight.

STAGE

2

Supplies

Lean but professional: everything on the "buy now" list earns its place by getting you work. Total starter budget runs **\$100-400** depending on whether loan signings are in the plan.

☐ **Notary stamp + journal**

Stamp must match your state's exact format. The journal is your legal lifeline — never skip entries.

☐ **E&O insurance bound (\$19-100/yr typical)**

Protects you from honest mistakes. Many signing services require proof before sending work — buy it before your first signing, not after your first scare.

☐ **Tell your auto insurer about business use**

A phone call, not a new policy — get the business-use confirmation in writing. Your car is the office.

☐ **Dual-tray laser printer + letter/legal paper (for loan signings)**

Loan packages mix paper sizes — single-tray means hand-sorting 150 pages. Refurbished is fine; "dual tray" is non-negotiable. Defer this if you're starting with general notary work only.

☐ **Scanning solution for scan-backs**

Many companies require page scans before you ship. A scanning app works to start; a portable scanner is the upgrade.

☐ **Go-bag: quality pens, document bag, phone charger**

Blue and black pens (borrowers sign per instructions), a weather-proof bag, and a charged phone — a dead phone misses the "can you be there in an hour?" calls.

☐ **Business cards (one cheap batch)**

Leave-behinds for general-notary clients and real-estate offices. Cheap is fine at this stage.

☐ **Mileage + expense log set up**

Deductions live or die on records. Log every mile and receipt from day one.

THE LEAN RULE

Every purchase must answer: "Does this get me a signing I wouldn't get without it?" The stamp, journal, E&O, and (for loan work) the printer pass. Everything else waits for revenue.

COMMISSIONED & EQUIPPED? HERE'S WHAT
COMES NEXT

The checklist gets you set up. The Playbook gets you paid.

The outreach scripts, the pricing math, the signing-service ladder, the templates — everything between "I'm ready" and "I'm hired" lives in **The First Signing Playbook**: 10 modules, 58 pages, zero fluff.

\$49

firstsigning.com/playbook.html

One-time purchase · PDF download · Priced under every \$97-\$297
competitor

STAGE

3

Profiles & listings

Signings don't find you — schedulers find you in databases. A scheduler spends about ten seconds per profile: look trustworthy in the scan or get scrolled past.

☐ **Professional headshot taken**

Plain background, business attire, smiling. Not a selfie, not a logo, not blank — this one field moves the needle.

☐ **SigningAgent.com profile live and 100% complete**

The directory schedulers search first. Fill every credential field — empty fields read as missing credentials.

☐ **Snapdocs profile verified**

Set an honest service radius and keep availability current. Orders go to the fastest qualified acceptance — speed matters here.

☐ **Registered with 20-30 signing services**

10-20 minutes each: credentials, coverage area, fee schedule. Most send nothing for weeks — then one slow Tuesday you're the closest available notary. It's a numbers game.

☐ **NNA certification + background screening current (if doing signing-service work)**

Typically \$65-199 bundled. Many services filter for it — without it you're invisible to them. Screenings expire, usually annually: calendar the renewal.

☐ **Professional voicemail greeting recorded**

Never the default robot voice. Schedulers who hit a dead-sounding voicemail call the next name.

☐ **Fee schedule written and saved as a PDF**

Base fees, travel zones, scan-back and after-hours add-ons. Know your state's per-act fee cap (\$2-15 is the common range) and never exceed it.

THE PHONE RULE

During your first 90 days, answer every unknown number in working hours or return the call within 10 minutes. An unanswered phone is the #1 silent killer of new signing careers.

STAGE

4

First signing

The first one is the hardest to get and the most important to nail — early ratings shape your future order flow. Treat your first 10 signings like auditions.

- ☐ **Accept the first order and confirm immediately**
Confirm in writing, reconfirm the day of. Over-communicate everything — silence reads as unreliability.
- ☐ **Read the signing instructions fully before printing**
Scan-back? Fax-back? Special ID requirements? The instructions are the exam; most errors come from skimming them.
- ☐ **Verify ID before anyone signs**
Name on ID must match the documents. If it doesn't, stop and call the hiring company before a single signature.
- ☐ **Walk the documents, deflect advice questions**
Short factual descriptions; point where to sign, initial, date. "Should I take this rate?" goes back to the loan officer — always.
- ☐ **Do the final page-flip before leaving**
Every signature line signed, every initial completed, every date correct. Count twice. A missed initial means a return trip on your dime.
- ☐ **Scan-backs sent, package shipped, tracking logged**
Same-day shipping per instructions. The job isn't over when you leave the driveway.
- ☐ **Send the thank-you message that evening**
"Package shipped, tracking [number], signed clean, no exceptions." Thirty seconds that turns one signing into a relationship.
- ☐ **Log the order: fee, miles, expenses, outcome**
Your records are your raise negotiation, your tax return, and your business intelligence all in one.

THEN CLIMB THE LADDER

Signing services (\$75–125/signing) are rung 1 — volume and ratings with no reputation required. Direct title companies (\$125–200/signing) are rung 2, earned through outreach after 20–50 clean signings. Don't try to skip rung 1.

YOU'VE GOT THE CHECKLIST. NOW GET THE
WHOLE SYSTEM

Want the scripts, the math, and the templates?

The First Signing Playbook (\$49) picks up where this checklist ends: word-for-word outreach scripts for title companies, the honest per-signing math, the 30-day action plan, and six fill-in templates — fee schedule, expense tracker, signing checklist, mileage log, and more.

\$49

firstsigning.com/playbook.html

58 pages · 10 modules · One-time purchase · PDF download

From zero to your first paid signing.

This checklist got you oriented. **The First Signing Playbook (\$49)** gets you hired — the complete, plain-English system for becoming a mobile notary and loan signing agent:

- ✓ The honest starting line — is this business right for you
- ✓ Your commission, step by step (TX, FL, CA worked examples)
- ✓ Training & certification: what you actually need
- ✓ The lean \$100-400 setup — buy-now vs. later
- ✓ Bonds, E&O, and insurance in plain English
- ✓ Getting listed where schedulers actually look
- ✓ The no-experience playbook — word-for-word scripts
- ✓ Pricing math: what you really keep per signing
- ✓ Your first 30 days, week by week
- ✓ Six fill-in templates: emails, fee schedule, trackers, checklists

\$49

firstsigning.com/playbook.html

First edition · October 2026 · One-time purchase · Instant PDF download