

REMOTE ONLINE NOTARY CHECKLIST FOR RECORDED PORTION
OF NOTARIZATION OF ESTATE PLANNING DOCUMENTS

1. Notify participants that session is being recorded and that recording cannot be paused.
2. Confirm client's name. (F.S. § 117.245(2)(b))
3. Ask client whether he or she is currently located in the State of Florida.
4. Confirm client wants the notarization to be performed by a Florida notary and governed by Florida law (if client is not in Florida and if client has not confirmed this desire in writing). (F.S. § 117.265(3))
5. Confirm witnesses' names. (F.S. § 117.245(2)(b))
6. Ask witnesses whether they are in the room with client.
7. Ask witnesses to state their addresses (if in the same room as the client). (F.S. § 117.285(2))
8. Ask witnesses to confirm that they are a resident of and physically located in the United States or a territory of the United States (if not in the same room as client). (F.S. § 117.285(4))
9. State titles of all documents client will be signing during the session. (F.S. § 117.245(2)(c))
10. State notarial acts you will be performing during the session. (F.S. § 117.245(2)(d))
11. Confirm client will be signing the documents knowingly and voluntarily. (F.S. § 117.245(2)(e))
12. Ask client the following 5 questions (if 2 witnesses are not in the same room as client):
 - Are you currently married? If so, name your spouse.
 - Please state the names of anyone who assisted you in accessing this video conference today.
 - Please state the names of anyone who assisted you in preparing the documents you are signing today.
 - Where are you currently located?
 - Who is in the room with you? (F.S. § 117.285(5)(d))
13. Confirm that each document is client's document.
14. Administer oath (if notarizing self-proving affidavit).
15. Require client and witnesses to state when they are initialing or signing or that they have initialed or signed each document. (F.S. § 117.285(3))
16. Complete notarial certificate or jurat on each document.