Morningstar Business Solutions LLC

MBS Loan Signing Agent Checklist

MBS Essential Briefcase



Mobile Essentials

1. Notary Essentials

- [ ] Notary stamp x2
- [ ] Notary journal
- [ ] Current government-issued identification
- [ ] All-Purpose Acknowledgment/Jurat certificate
- [ ] State-approved notarial certificates if needed
- [ ] Thumbprint pad, if needed
- [ ] Notary Public book for your state
- [ ] Ink for inkpad

2. Writing and Document Supplies

- [ ] Blue pens
- [ ] Black pens
- [ ] Highlighter
- [ ] Sticky notes or notepad
- [ ] Page flags
- [ ] Binder clips and paperclips
- [ ] Stapler, staples, and staple remover
- [ ] Legal size document folder
- [ ] Thimblets/rubber finger tips

3. Appointment Materials

- [ ] Appointment confirmation includes instructions and contact information
- [ ] Printed documents - 2 copies: one to sign, one to leave
- [ ] Shipping label and envelope

4. Technology and Travel Items

- [ ] Fully charged mobile phone
- [ ] Home/auto charger, cord, or portable power bank
- [ ] Mobile hotspot if needed
- [ ] GPS navigation
- [ ] Business cards