Notary Business Setup Checklist

Plan your foundation, prepare your workflow, and launch with confidence.

How to use this checklist: Work through the sections in order, write down questions that require state-specific confirmation, and revisit the checklist as your services grow.

1 Commission and state requirements

Begin with your state's official commissioning authority. Requirements and permitted acts vary by state.

- [ ] Locate and bookmark the official notary commissioning website for your state.
- [ ] Confirm application, education, exam, background check, bond, oath, and filing requirements.
- [ ] Record your commission number, effective date, expiration date, and renewal deadline.
- [ ] Review your state's identification, certificate, journal, seal, advertising, and fee rules.
- [ ] Create a renewal reminder at least 90 days before your commission expires.

2 Business identity and contact details

Use the same public business information everywhere so clients know they have reached the right professional.

- [ ] Choose a business name and confirm any state or local registration requirements.
- [ ] Create a dedicated business phone number and professional email address.
- [ ] Decide which service area, cities, counties, and travel radius you will publish.
- [ ] Purchase a clear domain name and connect it to your business website.
- [ ] Prepare a short business description, professional biography, and current profile photo.
- [ ] Keep your business name, phone, website, and service area consistent across profiles.

3 Services, fees, and travel policies

Clear policies help prevent surprises and make appointment requests easier to evaluate.

- [ ] List each service you are trained, authorized, equipped, and insured to provide.
- [ ] Separate state-regulated notarial fees from travel, convenience, printing, or other allowed charges.
- [ ] Create a general-notary travel policy with included miles, additional mileage, and minimum fees.
- [ ] Set flat signing-service fees where mileage is already included and mark them as no mileage.
- [ ] Define after-hours, weekend, hospital, detention facility, witness, and cancellation policies.
- [ ] Decide which payment methods you accept and when payment is due.

4 Equipment, supplies, and mobile readiness

Build a dependable everyday kit and a smaller backup plan for the items most likely to interrupt an appointment.

- [ ] Obtain a compliant seal or stamp and any journal required or recommended for your work.
- [ ] Stock blue and black pens, loose certificates, acknowledgement and jurat references, and receipt options.
- [ ] For signing work, confirm printer, scanner, paper sizes, toner, secure document handling, and shipping supplies.
- [ ] Prepare chargers, mobile hotspot access, navigation, lighting, and a weather-ready travel kit.
- [ ] Store supplies securely and protect documents and signer information from unauthorized access.
- [ ] Create a restock checklist and inspect the kit weekly.

5 Client experience and appointment workflow

A repeatable workflow creates a more professional experience from the first inquiry through follow-up.

- [ ] Use an appointment intake process that captures service, date, time, location, signer count, and contact information.
- [ ] Confirm document type without asking a signer to send unnecessary private document contents.
- [ ] Send identification, witness, payment, parking, and meeting instructions before the appointment.
- [ ] Use confirmation, rescheduling, cancellation, and arrival templates.
- [ ] Record the completed assignment, payment status, mileage treatment, and required journal entry.
- [ ] Send a thank-you message and an honest review request after a successful appointment.

6 Money, protection, and records

Keep business activity organized from the beginning. Ask qualified professionals about your specific legal and tax needs.

- ☐ Open a separate business bank account when appropriate for your business structure.
- ☐ Choose a bookkeeping process for income, expenses, receipts, mileage, invoices, and unpaid balances.
- ☐ Review errors and omissions insurance and any other coverage appropriate for your services.
- ☐ Create a secure retention process for business and notarial records.
- ☐ Do not store unnecessary identification images or sensitive signer data in general business notes.
- ☐ Schedule a monthly review of revenue, expenses, outstanding payments, and upcoming renewals.

7 Marketing and local visibility

Make it easy for nearby clients and referral partners to understand what you do and how to contact you.

- ☐ Publish a mobile-friendly website with services, service area, contact details, and appointment requests.
- ☐ Create and verify a Google Business Profile using accurate business information.
- ☐ Add your website and booking link to your business profile and social profiles.
- ☐ Request genuine reviews from satisfied customers without discounts, gifts, or incentives.
- ☐ Introduce your services to relevant local businesses and professional referral partners.
- ☐ Publish helpful local content that answers common client questions.

8 Launch readiness check

Complete this final review before actively promoting appointments.

- ☐ Test your website, appointment request, confirmation email, phone number, and contact form.
- ☐ Submit a test appointment and verify that it reaches your back office correctly.
- ☐ Review every public fee, service description, travel rule, and business detail for accuracy.
- ☐ Confirm that your calendar, supplies, credentials, insurance, and payment process are ready.
- ☐ Practice your appointment workflow from inquiry through recordkeeping and follow-up.
- ☐ Set one 30-day marketing goal and one monthly financial goal.

Your 30-Day Launch Plan

Turn the checklist into a simple month of focused action. Keep the goals realistic and review your progress at the end of each week.

Your next 30 days

Week 1	Finish commission and compliance research. Record every deadline.
Week 2	Set business identity, services, fees, travel rules, and payment policies.
Week 3	Prepare equipment, templates, website, profiles, and appointment workflow.
Week 4	Test the full client experience and begin consistent local outreach.

Write down your launch goals

First marketing goal	
First revenue goal	
First workflow improvement	

Questions and notes

This checklist is general educational information and is not legal, tax, financial, or state-commissioning advice. Requirements vary by jurisdiction and service type. Confirm current rules with the appropriate state authority and qualified professionals.

More practical resources: notarybaseos.com/resources