

Montana Notarization 10-Step Checklist

1. **Identify the requested notarial act.** Do not choose a legal act for the customer if doing so would constitute legal advice.
2. **Inspect the record for readiness.** Do not notarize an incomplete situation that prevents a lawful certificate.
3. **Require the principal to appear** in the manner authorized for the particular act.
4. **Establish identity** through personal knowledge or satisfactory evidence allowed by Montana law.
5. **Confirm capacity and willingness.** Refuse when you are not satisfied that the principal has capacity/competence or is acting knowingly and voluntarily.
6. **Verify representative capacity** when the signer claims to act for another person/entity.
7. **Perform the requested act** — acknowledgment, signature witnessing, oath/affirmation, jurat, copy certification, or other authorized act.
8. **Make the journal entry contemporaneously.**
9. **Complete the certificate completely**, including correct venue, act, names/subject, date, signature/title, and official stamp.
10. **Protect your journal and stamp** and retain/report them as Montana law and rule require.

Montana Notary Center — Independent education provider. Verify current requirements with official Montana sources.