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| #1 Licensing |

**Licensing Basic Checklist (Attorneys)**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Function** | **When** | **Who** | **Notes** | **Last Completed Date** |
| Establish list of which  functions need to be  licensed |  |  |  |  |
| Create file/notebook of licenses |  |  |  |  |
| Verify licensing  status using  State Bar website |  |  |  |  |
| Notify State Bar and title insurance underwriter(s)  when an attorney is no longer with your  firm |  |  |  |  |

**Attach list of licensed employees as next page(s)**

|  |  |  |  |
| --- | --- | --- | --- |
| List of attorneys and state in which need to be licensed | State(s) in which licensed | License Number | License last renewed: |

**Attach copies of the licenses also, for quick reference**

**Licensing Basic Checklist (Notaries)**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Function** | **When** | **Who** | **Notes** | **Last Completed Date** |
| Establish list of which  functions need to be  licensed |  |  |  |  |
| Create file/notebook of commissions |  |  |  |  |
| Verify commission  status with NC Secretary of State (if notary is executing notarial certificates in NC) |  |  |  |  |
| Review monthly for  expiration dates and  NC Secretary of State  accuracy |  |  |  |  |
| Notify NC Secretary of State and title insurance underwriter(s)  when a notary is no longer with your  firm |  |  |  |  |

**Attach list of licensed employees as next page(s)**

|  |  |  |  |
| --- | --- | --- | --- |
| List of notaries who need to be commissioned | State in which commissioned | Commission Number | Commission expires: |

**Attach copies of the licenses also, for quick reference**

**Licensing Basic Checklist (Agents/Underwriters)**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Function** | **When** | **Who** | **Notes** | **Last Completed Date** |
| Establish list of which  functions need to be  licensed |  |  |  |  |
| Create file/notebook of  licenses |  |  |  |  |
| Contact underwriter to  appoint each licensee |  |  |  |  |
| Verify appointment  status using  Department of  Insurance website |  |  |  |  |
| Review monthly for  expiration dates and  Department of  Insurance website  accuracy |  |  |  |  |
| ALTA Forms Licensing  Paid? |  |  |  |  |
| Notify Underwriter(s)  when a licensee is no  longer with your  agency |  |  |  |  |

**Attach list of licensed employees as next page(s)**

|  |  |  |  |
| --- | --- | --- | --- |
| List of agency employees that need to be licensed | State(s) in which licensed & appointed | License Number | License expires: |
|  |  |  |  |

**Attach copies of the licenses also, for quick reference**