|  |
| --- |
| #1 Licensing |

**Licensing Basic Checklist (Attorneys)**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Function** | **When** | **Who** | **Notes** | **Last Completed Date** |
| Establish list of whichfunctions need to belicensed |  |  |  |  |
| Create file/notebook of licenses |  |  |  |  |
| Verify licensingstatus usingState Bar website |  |  |  |  |
| Notify State Bar and title insurance underwriter(s)when an attorney is no longer with yourfirm |  |  |  |  |

**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 whichfunctions need to belicensed |  |  |  |  |
| Create file/notebook of commissions |  |  |  |  |
| Verify commissionstatus with NC Secretary of State (if notary is executing notarial certificates in NC) |  |  |  |  |
| Review monthly forexpiration dates andNC Secretary of State accuracy |  |  |  |  |
| Notify NC Secretary of State and title insurance underwriter(s)when a notary is no longer with yourfirm |  |  |  |  |

**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 whichfunctions need to belicensed |  |  |  |  |
| Create file/notebook oflicenses |  |  |  |  |
| Contact underwriter toappoint each licensee |  |  |  |  |
| Verify appointmentstatus usingDepartment ofInsurance website |  |  |  |  |
| Review monthly forexpiration dates andDepartment ofInsurance websiteaccuracy |  |  |  |  |
| ALTA Forms LicensingPaid? |  |  |  |  |
| Notify Underwriter(s)when a licensee is nolonger with youragency |  |  |  |  |

**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**