

ELECTRONIC SIGNATURE COMPLIANCE WORKSHEET

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ELECTRONIC SIGNATURE COMPLIANCE WORKSHEET

Run through this before sending a document for e-signature so it will hold up if it is ever challenged.

1. Is It E-Signable?

- ☐ Ordinary contract / agreement (generally YES)
- ☐ NOT a will, codicil, or testamentary trust
- ☐ NOT a divorce/adoption or other carved-out family-law document
- ☐ NOT a foreclosure / eviction / insurance-cancellation notice

If unsure, note the document type + state to verify: _____

2. The Four Validity Elements

- ☐ Intent to sign (the signer means to sign)
- ☐ Consent to do business electronically (captured)
- ☐ Association (signature tied to THIS specific document)
- ☐ Record retention (signed copy can be kept + reproduced)

3. Best Practices

- ☐ Used a real e-signature platform for anything important
- ☐ Verified signer identity (email / access code) for high-value docs
- ☐ Audit trail captured (who signed, when, from what IP)
- ☐ Saved the completed document + its audit trail

4. Does It Need Notarizing?

- ☐ If yes, use a remote online notary, not just an e-signature

INSTRUCTIONS FOR USE

Complete the bracketed fields, delete anything that does not apply, sign where required, and keep with your records. This template is provided for informational purposes only and does not constitute legal advice. Laws vary by state and change over time. Have an attorney review your completed document before relying on it. ClearLegalTips.com is not a law firm.