

Code of Conduct **List of Approved Version Changes**

Version 3.0 (Approved January 21, 2016)

1. Replaces “Certified Signing Specialist” and “Specialist” with “Notary Signing Agent” and “NSA” throughout.
2. Adds “Closing Disclosure” to and kept “Truth in Lending Disclosure” and “HUD-1 Settlement Statement” in the definition of “Critical Documents” (D.7). Also adds the words “and, as applicable, the” before “Truth in Lending Disclosure.”
3. Kept “HUD-1” in and adds “Closing Disclosure” and adds “as applicable,” following “other closing statement,” (4.6).
4. Kept “Truth in Lending Disclosure” in and adds “Closing Disclosure” and the words “and, as applicable, the” before “Truth in Lending Disclosure” and “other” before “closing statement” (9.9).
5. Amends the provisions that said the Signing Agent was to contact the lender’s representative by now saying Agents should contact the Agent’s contracting company (Guiding Principle 5, and Standards 5.6, 5.7, 5.8, 5.10, 5.11, 5.12, 6.8, 9.15, and 9.16).
6. Made a grammatical correction to the text of Guiding Principle 9 (adds “a” before “responsible”).
7. Replaces all references in the Code to “signing script” with “signing presentation guidelines” (D.15, 4.4, 9.5 and 9.7).
8. Adds the words “or lender” after the words “closing agent” (9.17).

Version 2.0 (Approved June 3, 2014)

1. Creates new Definition D.10 (“Non-Public Personal Information”).
2. Adds “transmission by fax,” following “transportation to the parties for signatures,” (D.16).
3. Adds “lender’s representative and” before “closing agent” (Guiding Principle 5).
4. Corrects “Specialists” with “Specialist’s” (2.4).
5. Adds “closing agent” before “or contracting company (2.7).
6. Adds “committed to the Specialist” before “under personal control” (6.7).
7. Adds “unless the requirements for the assignment materially change after the Specialist has accepts the assignment” following “negotiated fee.”
8. Deletes “or” places a comma after “accept,” and adds “or pay” after “charge” (7.3).
9. Deletes “and expenses incurred” (7.9).
10. Changes “Scripts” in the title to “Script” and in the body of the standard, deletes “all” and replaces it with “any” (9.5).
11. Changes all occurrences of “scripts” to “script” (9.7).
12. Adds “; provided, however, that a Specialist may modify a notarial certificate on a document requiring notarization to comply with law in the Specialist’s state or jurisdiction” to the end of the sentence (9.15).

Version 1.02 (Approved October 9, 2013)

1. Adds “or any other party to the transaction” to the end of the second paragraph, second sentence under Introduction, Contracting Company Expectations.
2. Applies full justification formatting to the Guiding Principles on page 5.

3. Adds “possesses a physical disability requiring accommodation that the CSP has not been trains and/or authorizes to perform,” after the word “signs” (5.6).
4. Adds “via secured means” after “them” and “, including but not limits to a secured drop box location or hand delivery at a facility or office,” after “service” (6.7).
5. Adds “either incomplete or” after “is” (9.9).
6. Adds “in writing” after “authorized” (9.15).
7. Replaces “Certified Signing Professional” with “Certified Signing Agent and “CSP” with “CSA” throughout.

Version 1.01 (Approved September 24, 2013)

1. Renames the Code “Certified Signing Professional Code of Conduct.”
2. Changes “Signing Professional” to “Certified Signing Professional” throughout.
3. Amends the definition “Critical Documents” by adding a comma at the end after “documents” and inserting “and other documents specified by the lender” (D.6).
4. Amends the Introduction, under Purpose of the Code, paragraph 4, by inserting “proper” before “execution” and deleting “and detecting and deterring fraud.”
5. Corrects a typo by renumbering the last Standard under Guiding Principle 2 to 2.12.
6. Deletes “a signer” and replacing it with “other parties” (6.2).
7. Deletes “Disposal” from the title and replaces it with “Return”, replaces “dispose of” in the text of the Standard with “return”, and “executed or unexecuted” before “closing documents” (6.9).
8. Deletes “the” after “alter” and replaces it with “or add a” (9.15).
9. Deletes “will” and replacing it with “is encourages to” (10.1).
10. Deletes Standard 10.5.