

# CHECKLIST TO START A FREELANCE PARALEGAL BUSINESS

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## 1. PREPARE

- Research the laws in your state regarding Freelance Paralegal work.
- Read and research Freelance Paralegal businesses. Check specifically YouTube, Kindle and then the web.
- Follow your local Secretary of States instruction on becoming a notary for your state. I suggest going through the N.N.A. (National Notary Association) They are a one stop shop for everything you will need. They also are state specific and will direct you to your state's requirements and webpages. While you are at the Secretary of States site, this is also where you will apply for your business name and formation. (AKA Articles of Incorporation).
- I highly suggest taking the "Signing agent" course and exam and getting certified! Again the N.N.A. will walk you through all the steps needed. You will be background checked, must pass a national test online and obtain error and omission insurance. I recommend getting a membership with them! Through their site you will receive quite a few job opportunities. This will come fast and allow you to bring in income while establishing contacts with attorneys and building your online presence.
- After you have your Articles of incorporation for your new business, apply for an EIN number with the IRS (make sure you double check that you are on the actual website for the IRS. There are many websites that will look just like a place to apply for an EIN. They will have a fee and they are not the IRS; they are simply companies that are set up to do the work of getting your EIN.) After you do that, go to your local bank, and get a business account! Create your social media if you like. I would at the minimum get your website going asap! This will be essential as companies and attorneys love to check out your vibe! They obviously are looking to see a minimal professional site. You can always connect your social media pages later as well as connect a business PayPal to most sites. If you are intending to sell services through your website, make sure you research to make sure you have the correct site set up.

## 2. BEFORE THE MONEY COMES ROLLING IN

- Set up a quiet office space that just belongs to you. If you are planning to do Signing agent work, you will need a laser printer with cartridges and a cheap regular ink printer with ink cartridges and of course lots of legal size and letter size paper. You will need a shredder, your notary materials and a professional briefcase or bag. You will need legal size mailers and free legal-size envelopes from both UPS and FED EX. You will also need lots of pens. Blue is most common, but at times you will also need black. Check your state rules, as some states require black ink. Make sure you get non-smearing pens! You will need sticky signature notes. These will help reduce errors and are one of the most valuable tools you can have!

- Set up an account on Snapdocs if you are choosing to signing agent work! This will account for a large amount of work. I recommend joining the “Notary café” which is a platform where notaries keep each other aware of good companies, bad companies, scams, and good companies to sign up with! They also have some seasoned pros that will offer great advice on making the most money you can while keeping yourself safe and some great overall tricks of the trade!
- Be prepared financially as most companies don’t pay out for 30 to 45 days! Just plan on most likely not seeing a penny of your hard work for 30 days. Once all those checks come in its so worth it though, so just hang in there!
- Be prepared from day one to meticulously track mileage, receipts and have type of accounting system set up. After you do a few signings, you will start to lose track of who has paid you and who has not. I kept a note on my phones with the companies I did signings for, how much the job was agreed upon, and the date of the signing. I did not put any of the clients’ names on the list on my phone to protect privacy. I also had my own physical notebook of the signings, client names and dates of jobs. This book never left my house and was always in a locked drawer. Quick books has an awesome app to help track expenses and mileage. It categorizes all expenses and income and tells notifies you of your taxes for each quarter as well as a yearly breakdown of income, milage and expenses and you can send this directly to your tax preparer or accountant! I love this app!

### **3. MAKING MONEY**

- Track all income!
- Ask for more money! You are allowed to bid and negotiate your pay! Most of the signing companies will offer an exceptionally low fee. Make sure you do your research and do not be afraid to ask for more! If it is a large print package, later in the evening, weather is bad, far away or any other reason, make sure you are getting paid what is fair. If you are doing straight paralegal work, make sure you review hourly rates and contract work rates for your area and state.
- Also be prepared to take some lower paying jobs when you first start. This does not mean accepting the unacceptable. You are spending your time, wear and tear on your vehicle, print costs, paper costs. Again, make sure you know the competitive pay for your area!
- Do not be afraid to learn. It is okay to make mistakes! Don’t let fear ever stop you from going after your dreams. Mistakes are how we learn. I guarantee after your first mistake you will likely never repeat that same mistake!

### **4. WORKIN’ IT!**

- Network with other paralegals! Ask if you can cover for them for doctors or other appointments. Let them know you are available! This would help tremendously and allow you to make more contacts! Once you get your foot in the door, you can showcase your skills and strong work ethic!
- Get set up with the SAM system. This is a government system that allows you to bid for government contract jobs and grants! If you would like to get set up for this, you can search for the procurement center near you. You can also sign up online, however, there are a couple different tasks you must do to complete the process and it is a time-consuming process.