

Check Before You Sign

Before signing a contract or mortgage, have the person offering products/services complete this form, sign it, and return it to you. Verify both the person and company are licensed and authorized to sell/offer the specific type of product, by contacting the appropriate licensing agency (see reverse side for agency contact information). Keep the completed form for your records.

Seller/Agent and Company Information (please print clearly)

Seller/Agent Name _____

Company/Business Name _____

Company/Business Address _____

Phone Number(s) _____ E-mail _____

✓ I am offering the following product(s) and/or services (check all that apply)

- Financial Planning:** Financial Planning Services Investment Advice
- Financial Services:** Mortgage Refinance Mortgage Modification
 Reverse Mortgage Home Equity Loan
 Escrow/Title
- Real Estate:** Broker/Agent Other _____
- Appraisal:** Home Appraisal Services
- Insurance:** Mortgage Insurance Title Insurance Property Insurance
 Earthquake Insurance Flood Insurance Life Insurance
 Other _____
- Legal Services:** Document Review Contract Review Estate Planning
 Other _____
- Accounting:** Accounting Services Tax Preparation
 Other _____
- Contractor Services:** Home Repair Remodeling
 Other _____

✓ I am currently licensed by

- CA Dept of Financial Protection & Innovation License #: _____
- CA Bureau of Real Estate License #: _____
- CA Bureau of Real Estate Appraisers License #: _____
- CA Department of Insurance License #: _____
- CA State Bar Association State Bar #: _____
- CA Board of Accountancy CPA License #: _____
- CA Contractors State License Board License #: _____
- Other _____ License #: _____

✓ I certify that I am making these representations truthfully in order to do business with you.

Signature: _____ Date: _____



Contact

the appropriate California licensing agency below (or call the California Department of Financial Protection and Innovation for referral to other agencies).

<i>Agency</i>	<i>Responsibilities</i>	<i>Contact Information</i>	
California Department of Financial Protection and Innovation (DFPI)	Licenses and regulates individuals and companies conducting various financial activities, including investment advisors, brokers, escrow/titles, mortgages, mortgage servicers, payday lenders and sellers of franchises.	Toll-Free TTY www.dfpi.ca.gov	1-866-275-2677 1-800-735-2922
California Bureau of Real Estate (CalBRE)	Licenses and regulates real estate brokers and salespeople, and mortgage lender/broker activities.	Toll-Free www.bre.ca.gov	1-877-373-4542
California Bureau of Real Estate Appraisers	Licenses and regulates real estate appraisal industry.	License verification & complaints www.orea.ca.gov	(916) 552-9000
California Department of Insurance (CDI)	Licenses and regulates insurance agents, brokers, companies, viaticals and annuities.	Toll-Free www.insurance.ca.gov	1-800-927-HELP (1-800-927-4357)
State Bar of California	Information to help you find an attorney. Also, file complaints and get assistance with reimbursement for attorney misconduct.	License verification & complaints Toll-Free www.calbar.ca.gov	1-800-843-9053
California Board of Accountancy	Licenses and regulates certified public accountants, public accountants and accounting firms.	Sacramento www.dca.ca.gov/cba	(916) 263-3680
California Contractors State License Board (CSLB)	Licenses and regulates 43 classifications of contractors and home improvement specialties.	Toll-Free www.cslb.ca.gov	1-800-321-2752